

# John Michael Hayes

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## EDUCATION

### Bachelor of Science, Finance & Accounting

W.P. Carey School of Business  
Barrett, the Honors College  
Arizona State University, Tempe, Arizona

May 2019

GPA 3.85

## RELEVANT COURSEWORK

ACC 440 External Reporting II (Fall 2018)

FIN 421 Security Analysis & Portfolio Management (Fall 2018)

FIN 461 Financial Cases & Modeling (Fall 2018)

FIN 427 Derivative Financial Securities (Fall 2018)

STP 420 Applied Statistics (Spring 2017)

FIN 494 Portfolio Engineering (Fall 2018)

## HONORS & AWARDS

New American University Provost's Scholar

Wells Fargo Asian Pacific Islander American Scholar

Dean's List: Fall 2016 - Present

Beta Alpha Psi

President Barack Obama Scholar

W.P. Carey School of Business Leaders Academy

AP National Scholar

Beta Gamma Sigma

## WORK EXPERIENCE

### Wealth Management Associate, TrustBank, Phoenix, Arizona

July 2017 – Present

- Assist in the administration of trusts to ensure proper legal proceedings were followed when executing distributions, trades, and other transactions
- Create spreadsheets to analyze qualitative and quantitative data for investment decisions
- Manage client relations and accounts in Redtail CRM, Cetera Investment Services, and Fidelity platforms to facilitate efficient processes necessary to the business' objectives
- Work with sales team to more effectively pitch client-customized wealth management solutions leading to growth in revenues of 120% year over year
- Work with partners to develop strategies to market services to diverse prospects
- Assist with banking transactions to ensure compliance with various regulations including BSA
- Create Excel spreadsheets and Access databases to optimize operations and streamline daily processes
- Work with Chief Fiduciary Officer and other senior partners in an entrepreneurial setting
- Assist in the work-flow management and execution of the acquisition of a financial planning firm to create further growth for the bank

### Center Consultant, FedEx Office, Tempe, Arizona

September 2016 – July 2017

- Performed work in a self-directed manner to meet diverse client needs and deadlines
- Consulted with customers to find unique solutions which addressed the individual needs of their businesses
- Promoted target products to achieve target revenue growth for the store
- Located opportunities for additional revenue in client transactions to further grow store revenue

## PROFESSIONAL DEVELOPMENT EXPERIENCE

### Fund Analyst, Undergraduate Student Investment Management Fund

August 2018 - Present

- Work in a team of 8 undergraduates to invest \$800,000.00 from the ASU foundation in portfolios constructed based on academic financial literature, while remaining constrained by the foundation charter
- Present portfolio performance to donors and other high net worth individuals in the financial services industry
- Create portfolios to deliver absolute returns which are then re-invested into the ASU foundation
- Receive instruction from the Jack D. Furst Professor of Finance, Sunil Wahal on portfolio engineering and construction in a joint MBA class setting

### National Association of College & University Residence Halls, Sponsorship Chair

January 2018 – May 2018

- Reach out to corporations and foundations to receive over \$100,000.00 in contributions to the conference hosted at Arizona State University
- Coordinated with other chairs to ensure sponsors received their promised benefits for donating to the conference

### Vista Community Council, Treasurer

January 2018 – May 2018

- Manage cash flows used to put on events for the residents of Vista Del Sol residential community
- Work closely with other staff members to promote attendance, gauge general interest, and market to residents
- Perform philanthropic work to help better the community