Jonathan Chisholm

19 Paulina Street, Somerville, MA 02144 | (617) 462-8512 | jchis@bu.edu | linkedin.com/in/jonathan-chisholm/

Skills and Credentials

Programming: R, MATLAB, SQL, Java, C, C++
Mathematics: Statistics, Calculus, Linear Algebra, Differential Equations
Certification: CFA Level I

Education

Boston University, Questrom School of Business — Boston, MA
M.S. Mathematical Finance & Financial Technology — Expected January 2022

Lehigh University — Bethlehem, PA
B.S. in Finance, Analytical Finance concentration (GPA 3.23) — May 2017
- Minor: Computer Science

Experience

Charles River Development — Burlington, MA
Senior Implementation Consultant; Solutions Delivery — August 2018 – July 2020
- Worked with major active fixed income investment manager with over $400B AUM and major index fixed income manager with over $2.5T AUM in implementing portfolio management software
- Configured and customized the software for workflow evaluation and product solutioning for synthesizing fund and benchmark data, order generation, what-if analysis, and cash management
- Implemented translations for fund and security data and assisted with data reconciliation

Associate Consultant; Technical Support — January 2018 - August 2018
- Solved 135 technical support cases with a 99% average satisfaction rating amongst portfolio managers and operations personnel
- Served as a portfolio management specialist, primarily working with the Manager Workbench tool on cases involving order generation and what-if analysis of positions and potential trades
- Completed additional model implementation, system administration, and cash management cases

Associate Consultant; Manager Workbench Product Team — July 2017 - January 2018
- Analyzed portfolio management product for missing or broken functionality and translated workflow gaps into product change stories within agile-scrum environment
- Conducted unit testing of new features and bug fixes as well as regression testing ahead of new version releases

State Street Global Exchange — Boston, MA
Intern; Research at State Street Associates — May 2016 - August 2016
- Conducted proprietary research on topics such as security liquidity and targeted risk portfolios
- Assisted with client requests by analyzing data with MATLAB and Excel to draw insights under deadlines

Acadian Asset Management — Boston, MA
Intern; Performance and Attribution Group — May 2015 - August 2015
- Developed model for allocating prorated management fees to commingled funds for automating net returns
- Produced reports to respond to requests from Institutional Investors

Additional Information

- Eagle Scout Rank in Boy Scouts of America: Project - All Weather Message Center for Public Park
- Interests: Division 1 Ultimate Frisbee (B Team Captain), Investment Strategy and Markets, Investment Systems - Data and Technology, Fantasy Football, Social Interaction - Behavioral and Emotional Psychology