

Michael R. Jones, MBA, CFP®

540-808-8828 | mrjones@vt.edu

PROFILE

Comfortable with public speaking having made dozens of presentations to a variety of audiences over career. Well versed in investment management and financial planning. Knowledge of corporate finance and private equity through prior experience and industry contacts.

EXPERIENCE

- | | |
|----------------|---|
| 2015 - Current | Founder and President, <i>Ataraxia Advisory Services, LLC</i> <ul style="list-style-type: none">· Started a Registered Investment Advisor (RIA) firm serving families and small businesses in the New River Valley and beyond· Provide financial planning and investment management services |
| 2005 – 2015 | President, <i>JSW Financial, Inc.</i> <ul style="list-style-type: none">· Managed all aspects of an independent financial advisory firm with >\$100M in assets under management· Provided financial planning and investment management services to individual and small business clients· Delivered educational presentations covering a variety of investment and planning topics to clients and prospective clients. Audience size up to 100. |
| 2002 – 2005 | Operations Manager, <i>BBA Nonwovens, Inc.</i> <ul style="list-style-type: none">· Management and budget responsibility of the thermal bonding department· 70 direct and indirect reports |
| 1999 – 2002 | Analyst and Production Manager, <i>Corning, Inc.</i> <ul style="list-style-type: none">· Various roles and responsibilities including assistant financial controller and manufacturing manager· Analyzed the financial and operational aspects of proposed manufacturing initiatives. Presented recommendations to upper management. |

EDUCATION, PROFESSIONAL DESIGNATIONS & LICENSES

- | | |
|----------------|--|
| 1997 - 1999 | Master of Science in Management (MBA), <i>Krannert School, Purdue University</i> |
| 1988 - 1993 | Bachelor of Science in Mechanical Engineering, <i>Virginia Tech</i> |
| 2009 - Present | Certified Financial Planning™ professional |
| 2005 - Present | FINRA Series 7 and NASAA Series 66 licenses |