

Jared Halbrook

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EDUCATION

College of Charleston School of Business

Bachelor of Science in Business Administration

Cumulative GPA: 3.7/4.00

Charleston, SC

May 2026

- Concentration in Finance
- Advanced academic standing through New Visions Honor Academy: Innovation, Leadership, & Business (37 Credits)

Study Abroad – Barcelona, Spain – Universitat Pompeu Fabra

January 2025 – May 2025

- Relevant Coursework: Financial Statement Analysis, Investments, Global Operations Management

EXPERIENCE

Vest Financial

ETF Product Development Intern

Charleston, SC

May 2025 – August 2025

- Analyzed structured outcome and income ETFs across competitors to evaluate option-based strategies, exposures, and risk/return trade-offs, informing new product design
- Built Python scripts to reconcile ICE pricing files, parse nested XML schemas, and validate model outputs, strengthening data integrity for signal-based strategies
- Partnered with portfolio management to troubleshoot payoff structures in OVME, improving modeling of strikes, floors, and autocallable features
- Created internal performance scorecards comparing competitor ETFs across 1-year, 3-year, and inception metrics for research integration
- Developed and presented final intern project outlining the structure and benefits of an uncapped accelerator strategy, highlighting product positioning and client applications to senior leadership

Callan Family Office

Business and Transactional Analysis Intern

Remote

October 2024 – December 2024

- Prepared research evaluating fund structures, performance, and positioning, supporting \$2B+ AUM allocation decisions by the Due Diligence Committee
- Conducted diligence on a lower middle-market PE fund, analyzing investment thesis and financial metrics to inform committee recommendations
- Integrated advising software into CRM workflows, reducing UHNW client evaluation time and improving onboarding efficiency
- Collaborated with senior advisors to review pitch decks and fund documents, developing insight to LP demand assessment and institutional allocation processes

Chemung Canal Trust Company

Deposit Operations & Account Services Intern

Elmira, NY

May 2024 – August 2024

- Verified and reconciled \$10M+ in IRA and money market accounts, maintaining compliance with state unclaimed property regulations and mitigating client risk
- Evaluated fee schedules and product strategy, providing recommendations to improve competitiveness and client profitability
- Reviewed and reconciled 2,000+ transactional entries and supported internal financial reporting, improving accuracy and timeliness of quarterly closeouts
- Verified municipal property tax payments across jurisdictions, safeguarding financial compliance and reporting accuracy

LEADERSHIP & INVOLVEMENT

Students of the Marsh

Treasurer

Charleston, SC

May 2025 – Present

- Manage chapter finances, overseeing a \$2750 budget while planning for future funding cycles and identifying grant opportunities to support ongoing initiatives
- Design marketing materials and execute outreach campaigns through graphic design and merchandise, increasing overall engagement with local students
- Coordinate and host student engagement events, including litter cleanups, marsh restorations, water-quality testing certificates, and educational programs connecting peers to local ecosystems

The Backpack Project

Treasurer

Charleston, SC

May 2025 – Present

- Manage a \$500 budget with transparent tracking of donations, expenses, and event funds to ensure stable and secure financial operations
- Coordinate distribution of 100+ backpacks filled with essential supplies, strengthening outreach to individuals experiencing homelessness across Charleston
- Partner with Greek organizations and consumer brand Poppi to expand fundraising reach and secure in-kind contributions

SKILLS

Technical: Excel, Python, PowerPoint, Word, Bloomberg

Languages: English (Native), Spanish (B2), German (A2)

Skills: Analytical Thinking, Communication, Adaptability, Time Management

Interests: Energy, Golf, Volleyball, Hiking