

JAKE HAYTON

Charlotte, NC

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PROFESSIONAL OVERVIEW

Senior Economics student at the University of North Carolina at Chapel Hill with 4+ years of customer-facing experience strengthening collaboration, and client relationships. Demonstrated experience and interest in asset management, investment research, portfolio management, and real estate investment across diverse asset classes. Highlights include an accelerated bachelor's degree track, early-stage venture involvement, Securities Industry Essentials certification, and experience as a Portfolio Analyst Intern at Trimont.

Market Research | Microsoft Excel | Securities Analysis | Asset Allocation | Portfolio Construction

EDUCATION

University of North Carolina at Chapel Hill – Chapel Hill, NC Dec. 2026

Major in Economics; Minor in Philosophy, Politics, and Economics

Gaston Community College – Gaston, NC May 2024

Associate of Arts

PROFESSIONAL EXPERIENCE

Trimont – Charlotte, NC June 2026 – Present

Portfolio Analyst Intern

- Analyzed commercial real estate underwriting, debt security analysis, and portfolio reporting concepts through 200+ hours of hands-on training and exposure led by industry-leading asset managers and loan servicers.

Miami Fusion Café – Denver, NC May 2025 – Aug. 2025

Server

- Contributed to daily operations while providing analytical input on a proposed compensation structure shift, highlighting incentive alignment and workflow efficiency associated with operational specialization.

Blue Fin Pools – Cornelius, NC Apr. 2021 – Aug. 2024

Commercial Pool Operator (Seasonal)

- Contributed to operational improvements that helped increase the company's client base by an estimated 30%.
- Gained exposure to early-stage venture operations, including workflow challenges and back-office cooperation.

LEADERSHIP AND COMMUNITY INVOLVEMENT

Commercial Real Estate Financial Council – New York, NY Apr. 2026 – Present

Academic Member

- Participated in 10+ events led by industry-leaders that focused on current events and skills relevant to CRE.

Wealth Management Association – Chapel Hill, NC Sep. 2024 – Present

Member

- Participated in 10+ events where students were taught the basics of wealth management and asset features.
- Competed in the Private Wealth Management vertical of the UG Alpha Competition in April 2026.

CERTIFICATIONS AND ADDITIONAL INFORMATION

- Completed and passed the Securities Industry Essentials exam administered by FINRA in January 2026.
- Graduated from high school with an Associate of Arts Degree through the dual enrollment program.
- Managed a \$10K+ individual investment portfolio over five years, producing an 8% annualized return.
- Founded the social fraternity Alpha Sigma Phi and served as a retention committee chair at UNC Chapel Hill.