

Jonathan D. Valle

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Education

University of Massachusetts, Lowell
Master of Business Administration

Lowell Massachusetts
May 2024

Experience

(NASDAQ: BXBL)
Head of Investor Relations

5345 East North Belt Rd, North Las Vegas, NV, USA, 89115
March 2024 - Present

- Created comprehensive investor targeting program to find new investors while supporting current investors.
- Planned and executed non-deal road shows, investor conferences, and dinner events on Wall Street. Hosted onsite meetings with stock exchange representatives. Managed strategic partnerships and investments.
- Managed relationships with; institutional investors, sell-side analysts, **NYSE, NASDAQ, TSX, LSEG, Euronext**, investment banks (bulge bracket -boutique). Sourced data on relevant indexes to leverage investor marketing.
- Collaborated with the finance team, legal staff, SEC, broker dealers, outside counsel on new offering statements, private placement agreements, 10k creation, Shareholder meetings, and SEC filings. Managed the investor relations departments budget, events, vendor invoicing. Responsible for the creation of investor relations communications (press releases, investor presentations, c-suite interview Q&A etc.).
- Private Placements, **pre-IPO stock exchange interviews, stock exchange listing selection for IPO**, ticker symbol reservation, sourcing underwriters for their IPO.

John Sawyer Company Inc.
Managing Director, Investments

30 Wall Street, New York, NY, USA 10001
January 2017 - May 2024

- Assist the CFO with production of financial documents, including quarterly earnings releases, financial news releases and SEC filings, investor fact sheets, and created electronic presentation materials used by senior management in investor-related settings.
- Collected data on investors' perceptions/opinions and presented these in monthly meetings to C-suite. Summarized reasonings behind relative stock price movements, Wall Street consensus to the executive team & board.
- Work with issuers on all aspects of their IPO (underwriting, sec filings, private placement, securities law etc.).
- Manage relationships across the investment community (investment banking, private equity, endowments, foundations, insurance companies, commercial banks, pension funds (retirement systems), capital markets, sovereign wealth funds etc.

Spartan Capital Securities
Investment Adviser Representative

45 Broadway, New York, NY, USA 10001
June 2013 - January 2017

- Executed high-volume securities transactions for accredited investors, leveraging market insights to optimize portfolio returns and achieve annual growth.
- Engaged with issuers as a placement agent for their private placements.
- Developed investment strategies for 100 + clients based on individual client investment objectives.
- Specialized in Securities Law, trading, and research.

Skills & Interests

Interests: Playing Piano, Cinematography, Writing, & Fitness.

Skills: Highly Motivated, Decision Making, Leadership, Marketing, Financial Reporting, Business Management, Lead Generation, Sales, SEC Filing, Organization, Data Analytics, Communication, Word, Excel, PowerPoint.