EVE T. JONES

SENIOR FINANCIAL ADVISOR

CONTACT

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EDUCATION

BUSINESS STRATEGY AND ANALYTICS “THE UNIVERSITY OF BUSINESS AND INTERNATIONAL STUDIES”

SKILLS

- Wealth Management
- Financial Planning
- Client Relationship Management
- Regulatory Compliance
- Investment Strategy Development

- **Expertise**: Financial Modeling & Investment Management Expert
- 12+ years of experience in market dynamics, ROI analysis, demand forecasting, pricing strategy, and elasticity modeling.

ABOUT ME

With over 12 years of experience, I provide personalized financial planning and investment advice. Registered with FINRA (Financial Industry Regulatory Authority), I serve clients across 17 states. I hold Series 6, 7, 63, and 66 licenses, offering expertise in asset management and wealth planning to help clients achieve their financial goals.

WORK EXPERIENCE

- (2020 - 2020)
- VP, Reginal Advisory Consultant
- Pruco Securities
- Successfully grew client assets under management through strategic business development and client acquisition initiatives.
- (2021 - 2021)
- Business Development Officer
- Thrivent Investment Management
- Managed regional advisory services, leading a team to provide personalized financial solutions for clients in the San Francisco region.
- (2021 - present)
- Senior Financial Advisor
- 12X Wealth Strategies, LLC
- Establish and cultivate long-term relationships with high-net-worth individuals, helping them achieve financial goals through tailored investment strategies.
- Analyze client portfolios and implement asset management strategies focused on growth, risk tolerance, and income generation.
- Senior Investment adviser- ALLSTATE FINANCIAL SERVICES
- (CRD# 18272)
- Broker- CITIGROUP GLOBAL MARKETS INC.

- Accounts Managed: 150+
- Portfolios in Progress: 120+
- PAMM Accounts: 25
- Staking Funds: 18
- Capital Under Management: $42M+

Specialized in quantitative modeling, investment strategy, and performance optimization across traditional and decentralized markets.