Michael Jorgensen

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FINANCIAL & SALES PROFESSIONAL

PROFESSIONAL PROFILE

- *Financial Analysis & Planning*
- *Sales – Marketing*
- *Client Relations Management*
- *Investment Specialist*
- *Project an Impeccable Professional Image*

Energetic, multi-dimensional, talented financial – sales professional with an ability to develop strategy to identify, obtain and build tools and financial models that drive successful sales–marketing initiatives that result in closings.

Play a pivotal role in the development and implementation of a business vision through disciplined financial modeling, benchmarking, feasibility analysis, financial risk management, forecasting, capturing and processing critical data, and financial and statistical reporting that contributes to sound decision making capabilities.

Practiced in working with top tier global stakeholders, engaging and creating client – confidant relationships that penetrates barriers, cultivating an awareness of client sensitivities and investment needs. Build rapport, trust and confidence, ensuring an uneventful settlement of financial transactions of scale.

Proven track record in accomplishing positive impacts across global multiple investment and trading platforms—fixed income capital markets, equities, real estate investment banking, alternative investments and mergers and acquisitions. Consistently achieve sustainability and measurable results.

Intimate knowledge of credit and economic analysis and financial risk management, structured finance, emerging markets, derivatives, asset-backed securities, budgeting, credit-sensitive markets worldwide and compliance.

Originate effective documents, reflecting clarity, precision, impact, balanced with an ability to listen, interpret and summarize data into meaningful information. Translate complex financial concepts for universal understanding.

CORE STRENGTHS

Sales & Market Planning
Financial Modeling / Planning & Risk Management
Reporting Business Performance Metrics
Process Reengineering
Communications & Liaison Affairs
Strategic / Investigative Research & Opinion
Relationship & Consensus Building
Investor Presentations & Consultations

Computer Skills: Advanced Excel Skills, Essbase, VBA, MS Word, PowerPoint, Access, Outlook

PROFESSIONAL EXPERIENCE

SWISS RE CAPITAL MARKETS, New York, New York 9/05 – Present
Structured Finance Specialist

<u>Selected Accomplishments</u>:

- Enjoyed a progressive career with rapid and consistent record of growth through the ranks, culminating as a major player in contributing to achieving financial goals and objectives.
- Structured and sold financial transactions of scale, realizing $30+ million in revenue.
- Provided strategic direction, planning and presentations with the sales team, ensuring a seamless synchronization of all components of the sales presentation to client and swift closure.
- Successfully developed and positioned fresh product lines, resulting in capturing new business.
- Formulated and implemented economic proposals for innovative structures.
- Architected new planning process and launched investment-analysis guidelines.
- Advanced a client-driven viewpoint. Delivered unprecedented client service. Enhanced client relationships through responsiveness, special attention to detail, and forming strong business alliances.

Played an active and critical role to the management team, with decision-making authority and total accountability for the entire spectrum of designing, selling and marketing structured securities.

Managed key relationships with clientele–institutional investors, hedge funds, pension funds, money managers. Identified and incorporated capital management solutions to dovetail with new requirements. Achieved transparency, flexibility; mitigated risk.

- Coordinated and communicated critical financial information to related parties–business lines, product groups, credit and risk management divisions.
- Performed daily monitoring of market and economic trends influencing investment positions.
- Worked collectively and collaboratively with team in the development and analysis of financial structures to identify and capture business opportunities.
- Accomplished a duel challenge–built and maintained sound relationships with clients as well as third party service providers.
- Structured, configured, implemented and marketed investment vehicles, with precedence on clients, creative solutions and idea generation.
- Cultivated and augmented relationships with significant investors. Constantly interacted with clients. Architected solutions that achieved their risk transfer needs, provided long-tail protection, diversification, high return and tradeability within the capital markets.
- Prepared and assembled all pertinent material to support the structuring process of securities issuances including rating agency presentation and negotiations of legal documents with internal and outside counsel.
- Represented the client in negotiation activities throughout the transaction process.
- Prepared PowerPoint presentation and quantitative exhibits for investors.
- Interfaced with external law firms, internal counsel and three modeling firms to ensure progressive structures.
- Maintained constant communication with investors, sponsors and other transaction parties to garner any demand or capacity not being exploited in the market.
- Formulated criteria, built and conducted due diligence on financial models.

Vice President [1/08 – 5/12]
Assistant Vice President [1/07 – 12/07]
Associate [9/05 – 12/06]

CREDIT SUISSE, New York, New York 8/04 – 8/05
Associate

- Provided financial analysis – business commentary in the areas of mergers and acquisitions, capital investments and budgets for the CFO division.
- Generated balance sheet analysis, comprehensive budgeting and forecasting reports.
- Developed an Excel based automation reporting system, utilizing VBA and Access databases, resulting in a significant increase in efficiency of key reporting processes.

EMAX SECURITIES, New York, New York 9/01 – 7/04
Investment Banker

Selected Accomplishments:

Generated a range of $100 million — $1.5 billion in portfolio loan sales:
$1.5 billion in Federal Housing Administration single family, multi-family and healthcare loan sales.
$1 billion Federal Housing Administration single family joint venture.
$100 million in U.S. Department of Education dispositions.

- Served as sale advisory consultant in the structuring of loans for U.S. Department of Housing, Urban Development and other government institutions.
- Constructed cash flow and financial models; devised risk transfer solutions; delivered presentations.
- Priced loan asset types including single family, multi-family, senior living and hospitals.
- Packaged and sold loans to investors.
- Conducted due diligence of assets–reviewed loan documents, leases, environmental reports, appraisals, physical needs assessments and operating statements.
- Underwrote and analyzed property rent rolls, property expenses, estimated TI/LC costs and local real estate market conditions.

EDUCATION

NEW YORK UNIVERSITY, New York, New York
BA, Economics, GPA: 3.33 Major: 3.55 — May 2000

LICENSES

Series 7, 79 and 63