

JEANNE SCOLNICK
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OBJECTIVE

Position as Financial Consultant or Investment Banker

SUMMARY OF EXPERIENCE

Financial Consultant with twenty two years of investment industry experience with extensive knowledge of the financial services sector. Expertise in financial planning, estate planning with insurance products, and corporate pension plans. Worked with public company executives to complete investment banking deals.

EMPLOYMENT HISTORY

CITIGROUP GLOBAL MARKETS, INC, 785 FIFTH AVENUE, NEW YORK, NY 10022
FINANCIAL CONSULTANT , March 2009 to Dec 2009

Managed clients portfolios through stock, bond, municipals, CD's and insurance products and well as professional money managers. Worked with estate planning attorneys to create legacy and transfer of wealth programs.

SMITH BARNEY, NEW YORK, NY, 450 LEXINGTON AVENUE, NEW YORK, NY 10017
FINANCIAL CONSULTANT, September 1994 to March 2009

Completed \$26 million private placement for a public company. Executed a \$40 million block trade on a foreign exchange for a U.S. public company. Handled personal accounts for key executives, sold key man insurance and managed a public company's 401-K plan.

MERRILL LYNCH, PIERCE, FENNER & SMITH
FINANCIAL CONSULTANT, March 1987 to September 1994

Opened retail accounts for high net worth and business professionals. Focused on estate planning and financial planning through insurance, mutual funds and municipal bonds and stocks.

LICENCES

SERIES 7 AND 63 LICENSE. INSURANCE LICENSED

EDUCATION

QUEENS COLLEGE, FLUSHING, NY
B.A., Psychology, 1980