



Jonathan Thomas Swanson, CAIA<sup>®</sup>, CPWA<sup>®</sup>

515.443.9141    jonathan.swanson@msgraystone.com    8 Foster Drive, Des Moines, IA 50312

## Profile

Business, finance and investment professional with institutional capital markets experience. Community minded individual looking to make a positive impact in the areas of education and the helping of at-risk youth.

## Professional Experience

### **INSTITUTIONAL CONSULTANT, GRAYSTONE CONSULTING**

**DES MOINES, IA (2011 – PRESENT)**

Provide institutional investment consulting services to 10-15 middle market institutional investors (i.e. college/university endowments, social service non-profits and faith-based institutions) ranging in size from \$5 to \$200 million in investable assets. Provide investment policy statement development and refinement, asset/liability management, asset allocation advisory, budget/spending analysis, manager selection, performance monitoring and fundraising and development advice.

### **PRIVATE WEALTH ADVISOR, MORGAN STANLEY PRIVATE WEALTH MANAGEMENT**

**DES MOINES, IA (2011 – PRESENT)**

Provide outsourced family office services to a select group of 35-40 family units located across the country. Advises to over \$1.2 billion as of January 2018. Targeted niche is pre and post-liquidity event planning to complex multi-generational family business owners, offering advanced planning (tax, trust, cash flow, estate and charitable planning to complex estates. Focus on families with investable assets north of \$10 million.

### **SENIOR RESEARCH ANALYST, TITAN ADVISORS LLC**

**STAMFORD, CT (2008 – 2011)**

Member of the hedge fund's eight-person manager selection committee. Firm AUM of \$7 billion spread across four multi-manager hedge fund portfolios. Primarily assisted in the manager selection process across managers investing in both the public and private equity markets.

### **EQUITY ANALYST, BEAR STEARNS & CO.**

**NEW YORK, NY (2006 – 2008)**

Analyst in the firm's global equities division. Provided market commentary and analysis which guided the daily actions of the International Equity Finance trading desk. Served as the junior co-manager of the firm's \$80 million equity finance balances in Canada. Coordinated cross-selling across the capital markets businesses with endowments and foundations.

## Education

### **LEHIGH UNIVERSITY**

**BETHLEHEM, PA (2002 – 2006)**

Graduated Cum Laude (with honors) from Lehigh University. Earned a Bachelors of Science Degree in Business and Economics with a focus on Finance. Served as Co-Captain of the Division One Men's Tennis Team.

## Certifications

Chartered Alternative Investment Analyst (CAIA<sup>®</sup>) – Earned in 2008

Certified Private Wealth Advisor (CPWA<sup>®</sup>) – Earned in 2013 at the University of Chicago's Booth School of Business

## Non-Profit Experience

### **BOARD PRESIDENT-ELECT, BIG BROTHERS BIG SISTERS OF CENTRAL IOWA**

**DES MOINES, IA (2015 – PRESENT)**

Active Board Member working to advance the mission of providing children facing adversity with strong and enduring, professionally supported one-to-one relationships that change their lives for the better, forever. Raised \$10k for the agency between hosting an inaugural Summer Soiree evening event and via support for Bowl For Kids Sake.

### **BOARD MEMBER, DOWLING CATHOLIC HIGH SCHOOL FOUNDATION**

**DES MOINES, IA (2017 – PRESENT)**

Active Board Member and Investment Committee Member working to advance the mission of the organization which is to prepare Leaders for Life, Centered on Christ.

### **FORMER BOARD MEMBER, ROCK IN PREVENTION**

**DES MOINES, IA (2012 – 2016)**

Former Active Board Member who worked to advance the organization's mission of helping children, teachers and parents learn the methods and skills to prevent bullying and drug use through music.

### **CO-FOUNDER, NEXTGEN FAMILY BUSINESS GROUP**

**DES MOINES, IA (2015 – PRESENT)**

Co-founded a peer group of 15 next-generation owners of large family businesses in Central Iowa. We meet quarterly and provide support to other members as it relates to business succession, conflict, leadership, governance and more.