

JARED KOWALSKI

ASSOCIATE PORTFOLIO MANAGER

CONTACT

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SKILLS

- Investment Management
- Asset Management
- Fixed Income
- Risk Management
- Credit Analysis
- Bloomberg
- Python
- SQL
- Excel
- Attention to Detail

EDUCATION

Bachelor of Science

05/2020
Carnegie Mellon University
Pittsburgh, PA
Computational Finance

CERTIFICATES

Chartered Financial Analyst (CFA)

10/2024
CFA Institute

SUMMARY

Associate Portfolio Manager with 6 years in investment management, co-managing \$1.4B in core and core-plus fixed income for institutional clients in Pittsburgh. Builds risk management and trade tools in Python and SQL, screens securities in Bloomberg, and keeps portfolios inside client guidelines.

EXPERIENCE

Associate Portfolio Manager

02/2023 - Present

Three Rivers Asset Management
Pittsburgh, PA
Fixed income manager with \$9B for pensions, insurers and endowments.

- Manage **\$1.4B** with the lead portfolio manager across 22 institutional accounts, beating the benchmark by 45 basis points a year.
- Execute 300 bond trades a month and allocate fills across accounts within compliance limits.
- Maintain a Python duration and key rate exposure tool that replaced 3 Excel workbooks.
- Present quarterly portfolio reviews to 8 pension committees alongside the CIO.

Investment Analyst

06/2020 - 01/2023

Allegheny Fixed Income Advisors
Pittsburgh, PA
Boutique asset management firm with \$3B in municipal and corporate bonds.

- Wrote SQL queries on holdings and pricing data for daily risk management reports across **90** accounts.
- Completed credit analysis on 70 corporate issuers and maintained an internal rating for each.
- Shortened reporting turnaround from 5 days to 2 by automating attribution in Excel.
- Monitored 40 client guideline limits daily and cleared flagged breaches before the trading close.

Investment Intern

05/2019 - 08/2019

Ohio Valley Public Pension Fund
Pittsburgh, PA
Summer internship with the fund's public markets team.

- Wrote a Python script that pulled **5** years of manager returns for the quarterly review.
- Compared 30 fixed income managers on fees, tracking error and returns.
- Drafted the monthly cash flow forecast for the \$2B plan.