

Robert J. Goger

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EXPERIENCE

Seaport Global Holdings LLC

New York, NY

Institutional Equity Sales

2019

- Leveraged equity product offering that included transportation, energy, industrials & cannabis research to provide institutional clients the means to meet their portfolio & investment objectives
- Pinpointed analyst clientele opportunities and appropriately directed the outflow of proprietary research to clients & prospects
- Tracked department financial objectives and served as McLagan liaison in monitoring revenue and flows targets
- Supervised sales & trading summer interns

Bloomberg L.P.

New York, NY

Equity Specialist

2018-2019

- Provided live customer support to Bloomberg clients, specializing in Bloomberg equity functionality and software
- Guided equity portfolio managers, traders, analysts and salespeople in building fundamental and estimate analysis, often demonstrating the calculation methods behind different reporting methods and adjustments and consensus estimates
- Specialized in integrating Terminal data into Excel using Bloomberg API and specialized in charting functionality
- Proactively educated clients across all asset classes on new products and functionality to foster continued and improved Terminal usage
- Successfully completed Bloomberg foundational 1 & 2 trainings which focused on broad based financial market knowledge and Terminal use expertise

JP Morgan Private Bank

New York, NY

Investment Professional (Multinational Group)

2016 – 2017

- Managed the sales, tracking and processing of alternative investments in client portfolios
- Pinpointed new alternative investment opportunities for clients based on objectives and past fund investments
- Assisted high net worth clients with trading complex structures and led the process for sophisticated clients to opt up to trade Dodd Frank regulated derivative products
- Aided clients with self directed investment account openings, discretionary account openings and live trade execution
- Generated SMA portfolio mandates
- Acted as team investments business manager and tracked the status of initiatives and corporate actions as well as team and individual revenue and investment flows goals
- Provided clients daily updates as to any capital calls or distributions of any Private Equity holdings in their portfolios

Bridgewater Associates, LP

Westport, CT

Research Associate

2014 - 2015

- Managed the resourcing of data analysts to emerging market, equity, credit, commodity, rates and foreign exchange teams based on project priority and market changes
- Collected and escalated problems from each asset class team to the general managers of the Research Analytics department and helped provide thought partnership in providing a solution
- Built decks and work plans that outlined 6 month goals for each team using MS Word, Excel and PowerPoint
- Stored and distributed audio and video files that contained key management content and informed the status of key projects and initiatives

EDUCATION

Fairfield University

Fairfield, CT

Bachelor of Science: Finance

May 2014

UNIVERSITY LEADERSHIP EXPERIENCE

Fairfield University Student Association (FUSA)

Fairfield, CT

Member (Chairman of Concerts, Chairman of Athletic Programming, Chairman of Senior Week)

2010-2014

- Owned budgets ranging up to \$30,000, planned semi annual concerts, professional athletic ticket purchases for campus students and organized original events for the graduating class during their senior week

ADDITIONAL INFORMATION

Series 7, Series 63 (Active)

Fairfield University Club Rugby (D1-AA) Four-Year Player and Officer

Proficiency with Bloomberg, API/Microsoft Excel, Power Point, Word, Outlook, Adobe Reader

CRM (Workstation & PROS)