

Jerry Marlow, MBA

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Professional summary

Thirty-plus years of experience and leadership roles in communications strategy, marketing writing, speech writing, financial writing, financial modeling, organizational development and presentation design for financial institutions, hedge funds, universities, real estate firms and law firms

Staff or consulting roles in which I can contribute most to your firm's success

Chief Writing Officer, Director of Communications, financial writer, technology writer, real estate writer, speech writer, marketing writer, organizational development consultant

Skills and qualifications

- Adept at interviewing senior executives, asset managers, technology professionals, quantitative modelers, scientists and anyone else who speaks English
- Write in a way that makes it easy for clients, investors and employees to understand complex products, services and concepts
- Can write, design and create pitch books and presentations that make transactions happen, build relationships, create value, shorten sales cycles and transform organizations
- From knowledge of information theory, use language to energize organizations, reduce cognitive uncertainty and increase productivity
- Knowledgeable about communications strategy; organizational development; investment strategies; quantitative modeling; derivatives; Dodd Frank; technology strategy; global market for luxury residential properties; commercial real estate; and flows of instructions, valuations and accounting entries that characterize securities trading, securities processing, collateral management and other financial services
- Understand and can explain to others that every financial forecast is a probability distribution and to value a financial asset is to evaluate the probability distribution of the asset's potential payoffs or cash flows
- Excellent skills in PowerPoint, Excel, Word, Dreamweaver and Jive business-collaboration software; basic skills in Photoshop, Illustrator and InDesign

Audience responses to my work

- Chairman of IBM's response to board presentation I created for bank's CTO, "That was the best presentation I've ever seen!"
- Response of ultra-high-net-worth individual to investment-strategy presentation that I wrote and designed, "I'd like to put \$2 million under management with you."
- Accountant's response to my book "Option-Pricing: Black-Scholes Made Easy" (Wiley) and its simulator, "Having grappled with this area for a few months, I decided I needed a little more innovative help; hence my purchase of Jerry Marlow's interactive tutorial. Two days later and I feel I could go for the next Nobel Prize myself!"
- Response to "Black-Scholes Made Easy" of Harvard student whose first language is not English, "Your book is friendly and easy to understand. I like your writing style. You express complex ideas in easy words."
- Data-entry clerk's response to organizational development presentation that I wrote and designed, "I never knew my job was so important. I can't wait to get back to work!"
- Convention-audience response to speech I wrote for celebrity real-estate agent: standing ovation
- Response of five hundred senior managers to strategy presentations I designed and produced for leader of Bankers Trust's fiduciary, securities and trust division: cheers, tears, roars of laughter and enthusiastic embrace of leader's strategy

Consulting and Freelance Achievements

Financial writer, speech writer, technology writer, marketing writer, real estate writer, presentation designer
New York, NY 1/1999 to present

- Write speeches, write marketing materials and create pitch books and presentations for financial institutions, hedge funds, asset managers, law firms, financial-software companies and real-estate firms
- Wrote, designed, produced and staged management-strategy presentations, organizational development events and board-of-directors presentations
- Wrote brochure to recruit elite college graduates to be technological bankers
- For technology group that supports settlement of Citi's capital-markets trades, developed and implemented writing approach designed to make technologists successful
- For college professors and PhD candidates, edit academic papers to be submitted to quantitative-finance journals and marketing journals
- Created pitch book to persuade Disney to open a hotel in the old New York Times building
- Wrote speeches and created presentations for investment-firm principals and managing directors to give at *Institutional Investor* and other industry conferences
- Wrote "Option Pricing: Black-Scholes Made Easy" (John Wiley & Sons); developed modeling software to accompany book
- Gave seminars to forensic CPAs and divorce financial planners on options-pricing theory and on how to value employee stock options in divorce proceedings
- Developed interactive tutorial on FX options
- Developed an option market simulator
- Developed a retirement-risk simulator
- Wrote and designed presentations to sell derivatives-based investment strategies to ultra-high-net-worth individuals
- Developed pitch book for hedge fund that trades index options

Staff and Executive Experience

BNY Mellon Global Collateral Services VP, Senior Writer,
New York, NY 4/2013 to 10/2013

- Wrote and edited white papers, presentations and marketing brochures that explained the bank's collateral services and the impact on asset managers of Dodd-Frank and EMIR reforms

Ironwood Global, LLC

Managing Director, Communications

New York, NY 3/2011 to 4/2012

- Ironwood, a hedge fund, sought to buy 33,000 FHA-insured mortgages in default at steep discounts from their unpaid balances. Ironwood's intention was to offer homeowners principal reductions that would get homes above water and motivate homeowners to re-perform on mortgages
- Developed communications strategy
- Created pitch books and brochures to explain firm's proposal to FHA, HUD, White House, OMB, investment bankers and investors

Thunder & Lightning Productions, Inc., CEO

New York, NY 1/1986 to 12/1998

- Ran company that produced and staged organizational-development and management-strategy events for major financial firms. Audiences ranged in size from 500 to 1,200 people.

Bankers Trust (now Deutsche Bank)

AVP, Director of Promotion and Training

New York, NY 4/1981 to 1/1986

- Wrote promotional brochures and produced presentations to market trust services, corporate cash-management services, U.S. and international payment services, securities-clearing services and international clearing services
- Managed brochures through compliance, graphic design and printing
- Wrote and produced organizational development presentations
- Managed staff, advertising budget and promotion budget

Education

Post-MBA Program, Finance,
NYU Stern School of Business

MBA, Marketing, NYU Stern School of Business

BA, New York University

Major: Psychology, Minor: English

Computer skills

- Microsoft Excel, PowerPoint, Word
- Adobe Photoshop, Illustrator, InDesign,
Director/Shockwave, Dreamweaver
- HTML5, CSS3, JavaScript
- Jive business-collaboration software

Writing and presentation samples

www.jerrymarlow.com

References

- Furnished upon request