

Jerry Marlow, MBA

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Professional summary

Thirty-plus years of experience and leadership roles in financial writing, investment writing, marketing writing, speech writing, technical writing, real estate writing, financial modeling, and pitch-book design for financial institutions, hedge funds, real estate firms, and law firms.

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

Financial writer, investment writer, technical writer, real estate writer, speech writer, marketing writer, support writer and editor for a law firm, Chief Writing Officer.

Skills and qualifications

- Adept at interviewing senior executives, asset managers, real estate developers, technologists, quants, and other experts
- 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 energetically engage your audience, nail their decision criteria, shorten sales cycles, make transactions happen, build relationships, create value, and transform organizations
- From knowledge of information theory, write in a way that energizes people and motivates them to take action
- Knowledgeable about investment strategies; derivatives; alternative investments; global market for luxury residential properties; commercial real estate; technology strategy; quantitative modeling; data management; law of negligence torts; law of contracts; market for electricity; behavioral finance; organizational development; asset valuations, and flows of instructions and accounting entries that characterize securities trading, securities processing, collateral management, and other financial services
- Understand and can explain to others that, over a given time horizon, every financial forecast is a probability distribution and that, to value a financial asset is to evaluate the probability distribution of the asset's potential payoffs or cash flows
- To learn more, visit my website www.chiefwritingofficer.com.

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 an ultra-high-net-worth individual to a presentation that I wrote that pitched a derivatives-driven investment-strategy, "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."
- Employee'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!"
- Audience response to speech I wrote for real-estate agent: standing ovation
- Response of five hundred officers 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
- Created www.chiefwritingofficer.com.
- Created www.wasyourcartotaledorstolen.com
- 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, wrote guides to trading technology
- For college professors and PhD candidates, edit academic papers to be submitted to quantitative-finance journals and marketing journals
- Created pitch book to entice Disney to open a hotel in 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, Visual Studio Code
- Adobe Photoshop, Dreamweaver
- HTML5, CSS5, JavaScript
- Jive business-collaboration software

Writing and presentation samples

- Visit www.chiefwritingofficer.com.

**What my approach to writing
can do for your organization**

- Visit www.chiefwritingofficer.com.

References

- Furnished upon request