

Jae Chon

Senior leader focused on building strong and collaborative teams while guiding strategic direction for global growth. Team player with a passion for maintaining a strong culture of client-first approach, empathy, teamwork and accountability.

EXPERIENCE

Brown Advisory, Baltimore, MD

2011-Present

Principal & Director of Trade Management

2012-Present

- Principal directly responsible for the global oversight and strategic growth of pre-trade and post-trade Operations including Institutional Equity portfolio modeling (Pooled vehicles, SMA and UMA), and Middle Office trade communication and settlement
- Responsible for all client cash management and cash transactions globally
- Co-led effort to develop and implement global operations infrastructure and custody arrangement for Brown Advisory's International Private Client business
- Led initiative to identify and implement global middle office trade communication technology and guided implementation of new fixed income trading system for middle office team
- Partner with leaders across all areas of the organization including Trading, Research, Compliance, Operations and Portfolio Management to collaborate on strategic planning and execution
- Responsible for all pricing and valuation within the organization covering both marketable and non-marketable assets including equities, fixed income, derivatives, hedge fund vehicles and private equity vehicles
- Current Chairman of the Firm's Global Pricing Committee
- Responsible for reference data vendor management and oversight. Led cross-functional team to develop strategic plan for pricing vendor relationships resulting in \$500K+ savings over four years
- Previously managed Operations teams including Reconciliation, Corporate Actions, and Security Master teams

Business Strategy Manager

2012

- Founded and implemented a new group within the organization; developed structure and recruited staff focused on executing strategic projects and business growth
- Responsible for the implementation, project management and long-term growth of enterprise-wide projects and initiatives exceeding \$2MM in total spend
- Negotiated with counterparties and providers to ensure interests of clients and firm were protected

Trade Support Supervisor

2011-2012

- Created and supervised firm's Trade Support team; revamped and directed middle office structure and processes
- Led overhaul of communication and operating procedures from trading desks to external stakeholders
- Served as liaison for multiple internal teams; facilitated and developed streamlined workflow and synergies
- Directed communication and execution for variety of securities including mutual funds, equities, fixed income, options, government securities and private placements, among others

Legg Mason Capital Management, Baltimore, MD

2007-2010

Manager, Trade Support

- Managed firm's Trade Support team & Middle Office; responsible for settlement of equity, fixed income, options, FX, physical settlement and private placement trades; consistently recognized as top 99-100% in industry for on-time affirmation and settlement
- Served as lead analyst for firm-wide client, directed brokerage and soft-dollar trading commission analysis and reporting; reduced task time by 80% by creating and instituting automation
- Organized two successful major migrations of trade allocation and SWIFT communication platforms, successfully reducing operating costs
- Developed and instituted a new system to centralize and track a wide variety of unique security trade information and documentation
- Coordinated numerous projects affecting multiple departments to reduce firm's overall trade risk exposure

EDUCATION

Georgetown University, The McDonough School of Business

Washington, D.C.

Master of Business Administration

University of Maryland, College Park, The Robert H. Smith School of Business

College Park, MD

Bachelor of Science - *Finance and International Business*

SERVICE

Howard County Council, Member, Board of Personnel

- Active second term board member appointed by Howard County Executives Allan Kittleman (current) and Ken Ulman (former)

Bon Secours Community Works, Member, Board of Directors

- Serve the non-profit community foundation of Bon Secours Hospital Baltimore in providing strategic guidance in service to communities in West Baltimore

Stephen M. Long Memorial Foundation, Co-Founder and Director

- Scholarship foundation to recognize high academic achievers matriculating to the University of Maryland, College Park

Living Classrooms Foundation

- 2012 Rising Star recipient
- Continuous ad-hoc support for the Living Classrooms Foundation and its mission

LANGUAGES

- Fluent in Korean