Jaylon Rodriguez

Investment Analyst · Argent Trust Oklahoma · Tulsa, OK

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Experience

Argent Trust Oklahoma (formerly AmeriTrust) / Argent Financial Group

MAR 2023 — PRESENT

Investment Analyst (February 2025 – present)

- **Investment management:** Execute rebalancing and trading across $1B+ in trust, retirement, and institutional client portfolios, keeping accounts aligned with investment policy statements, target allocations, restrictions, and cash needs.
- Research equities, fixed income, funds/ETFs, and alternatives; deliver recommendations that inform portfolio construction and asset allocation decisions.
- Lead quarterly reporting cycles and deliver client-facing portfolio reviews and presentations, including for institutional clients.
- **Data & automation:** Led the transition off a legacy data provider the office had used for 20+ years: negotiated a several-month extension on a six-week shutdown notice, helped select LSEG, reverse-engineered the provider's discontinued calculations, and converted the model workbooks without interrupting the investment process.
- Built Python, SQL, VBA, and Power Query automation that cut prep time ~90% on affected reports and automated 40–50 hours a month of recurring work, including daily cash reporting, trade checks, earnings updates, and a daily discount-rate model.
- Developed research tooling across ~3,900 securities: an earnings-trend updater, a weekly earnings alert, a stock-file database verified by parallel run before cutover, and a React research dashboard; prototyped concentration, drift, and optimization analytics.
- Renegotiated a market-data vendor contract, cutting that cost roughly in half; leading the office's move from a legacy shared drive to SharePoint.
- **AI programs:** Selected for Argent's AI Task Force (June 2026); one of the most active participants in the enterprise AI pilot; presented 18 automation and AI projects to senior leadership.
- Created AI Wednesday, a weekly internal AI briefing (22 editions); delivered AI Basics talks to ~25 retired executives (invited back) and ~20 Argent staff.

Financial Associate / Analyst (March 2023 – January 2025)

- Supported rebalancing and trading across client portfolios totaling $250M+, aligned with market conditions and client objectives.
- Led the firm's transition to a new data provider and overhaul of analytic systems; led multiple automation projects that improved team efficiency and reporting accuracy.
- Delivered client presentations, particularly for institutional clients, and led quarterly reporting cycles with performance summaries and commentary for client meetings.

Shell Oil Company / OU Corporate Valuation Challenge

AUG — DEC 2021

Finalist

- Produced an investment recommendation for a publicly traded corporation using comps, precedent transactions, and DCF models; presented to a panel of professional judges.

Selected projects

- **Legacy Data-Provider Transition —** Replacement of a 20-year market-data source on short notice: rebuilt discontinued proprietary calculations on LSEG data and batch-converted the Excel model workbooks.
- **Daily Pipelines & Operations Automation —** Scheduled Python tools for cash reporting, trade checks, a daily discount-rate model, and a trust-team reconciliation, together about 40–50 hours a month of manual work automated.
- **Investment Research Database & Dashboard —** Python/SQLite database over ~3,900 stock-model workbooks, plus a stock-file database verified by parallel run; React dashboard for search, comparison, and sector filtering.
- **Earnings Automation Suite —** LSEG-to-Excel earnings updater (~30 hours saved a quarter), a weekly earnings alert across ~3,000 securities, and a stock-split alert.
- **38-Year Asset Allocation Study —** Efficient-frontier and rolling-period analysis of U.S. equity, international equity, and intermediate fixed income; interactive Plotly dashboard for client conversations.
- **Iron Ledger / Manifest / Quartermaster (personal) —** Full-stack apps shipped end to end: React/Next.js, Supabase, Vercel, Capacitor iOS on TestFlight; offline-first sync, push notifications, HealthKit, 700+ automated tests.

Leadership

Argent Trust Oklahoma — AI Task Force JUNE 2026 — PRESENT
Selected member; AI Wednesday author; Executives of Tulsa (invited back) and Argent Lunch & Learn presenter

Argent Trust Oklahoma — Digital Asset Working Group
Member

Family & Children's Services, Tulsa — Young Professional Advisory Council 2025 — PRESENT
Member

Sigma Phi Epsilon, University of Oklahoma AUG 2017 — MAY 2018
Philanthropy Chairman — organized social and charitable events for 150–400 people

Education

University of Oklahoma, Norman, OK AUG 2017 — DEC 2022
Price College of Business — Bachelor of Business Administration in Finance

- Price College Dean's Honor Roll (5 semesters) · Academic Achievement RTW Scholarship · OU Investment Club · OU Clay Target Team · Volunteer, OU Big Event

Other experience

Thunderbird Berry Farm, Broken Arrow, OK MAY 2017 — PRESENT
Farm Project Manager — manage farm projects and lead a team; resolve operational challenges

Vail Resorts, Breckenridge, CO OCT 2020 — MAY 2021
Ski Technician and Driver

LICENSES & CERTIFICATIONS

Series 65 — NASAA
SIE — FINRA
Bloomberg Market Concepts
CFA Level I — in preparation

TECHNICAL

Python (pandas, pyodbc, Plotly)
SQL / SQLite
Excel VBA · Power Query
Power Automate · Task Scheduler
Node.js · React / Next.js
Supabase · Vercel · Git · Docker

INVESTMENT PLATFORMS

LSEG Workspace
Morningstar Direct · YCharts
Koyfin · Black Diamond · Portfolio Center
Envestnet