

James Stone President, James Stone Consulting



Jim Stone is a highly experienced senior project manager with a strong background in corporate financial planning and analysis and business management. With over 30 years of industry experience, he has held various roles such as project manager, reengineering specialist, business manager and financial planning and analysis expert in the financial services sector. After gaining more than 25 years of valuable experience at leading banking and financial services firms, he decided to start his own consulting practice. Throughout his career, Jim has worked with esteemed clients such as JP Morgan

Chase, Wells Fargo, Deutsche Bank, PIMCO, HPS Investment Partners, and many others. His consulting projects have focused on implementing risk-based regulatory and compliance solutions, process reengineering, software procurement decisions, risk management technology implementation, and enterprise planning and execution. Jim's knowledge spans from fixed income trading to shared services to firm-wide consolidated performance reporting.

In addition to his professional achievements, Jim is actively involved in local youth groups and supports his alma mater. He serves as a mentor to the Lehigh Football team, represents Lehigh at local college fairs, and participates in numerous career workshops within the College of Business. Jim has also played a key role in recruiting at both Merrill Lynch and JP Morgan, having hired over 100 Lehigh students. Outside of work, Jim enjoys golfing and skiing. He currently resides in Westfield, NJ with his wife, Nadine, and their daughter.

EDUCATION:

Fordham University
MBA, 1995

Lehigh University
B.S. Finance, 1988

WORK HISTORY:

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| James Stone, LLC | 2017 - Present |
| JP Morgan Chase | 2013 - 2017 |
| Jefferies Group | 2010 - 2013 |
| Merrill Lynch | 1993 - 2008 |



LEHIGH
UNIVERSITY

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Business**