

Jake T. Carlyle

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EDUCATION

Indiana University, Bloomington, Indiana

Bachelor of Science - Sport Marketing & Management

Minors: *Kelley School of Business* — Business, Finance, and Marketing

EXPERIENCE

Institutional Shareholder Services (ISS), Norman, OK April 2021-Present

Senior Associate, Hedge Fund Client Success Team Lead – West Region May 2022-Present

- Managed and mentored a team of 4 employees - which oversaw over 400 of the firm's clients and accounted for \$10 million+ in annual renewable revenue.
- Maintained a 95%+ annual renewal rate amongst clients falling under my team's purview.
- Collaborated with fellow department managers to develop department goals/KPIs and communicated said goals to my team.
- Acted as hiring manager of new team members and assisted with the development of a training schedule for the West region.
- Collaborated with domestic and global team leads across each department within the organization to help develop, and implement, platform improvements.
- Continued to serve as the main point of contact and proxy expert for a personal book of over 110 hedge funds and institutional investors across the United States and Canada.

Associate, Client Success Manager – Hedge Fund Specialist April 2021-May 2022

- Served as the main point of contact and proxy voting expert for over 130 hedge funds and institutional investors across the United States and Canada - which accounted for \$4 million+ in renewable revenue.
- Communicated daily with C-suite individuals, general counsels, and hedge fund managers to assist in proxy voting and proxy reporting needs.
- Acted as project manager to help facilitate client requests and ensure their completion in the agreed upon timeline.
- Deciphered and explained proxy relevant, SEC-required regulatory filings to clients and their compliance teams.
- Worked with, and maintained, solid relationships with custodian bank and ballot provider contacts.
- Organized and led annual due diligence meetings and assisted in distributing annual compliance materials for all clients.
- Utilized Microsoft Excel and Salesforce to organize client reporting and assist in ensuring clients' accounts maintain excellent health.

Indiana University Athletics, Bloomington, IN August 2016-July 2017

Ticket Office and Athletic Department Intern

- Provided customer support for patrons wishing to purchase tickets and acquire information regarding IU Athletic events.
- Completed sales transactions for patrons wishing to purchase tickets to IU Athletic events, both over the phone and in-person.
- Worked in a customer facing role on gameday events for IU Athletics during football, basketball, and baseball season.
- Assisted marketing department with various event setups for gameday events.

Anthology Consulting, Indianapolis, IN

January-May 2017

Marketing Consultant Intern

- Developed a marketing and advertising plan for the client, Ace Hardware.
- Analyzed market data and trends to develop insights related to untapped consumer segments to accomplish the objective of driving store traffic.
- Worked within a team of 5 to develop strategic opportunities for the client.
- Researched, compiled, and analyzed market and target consumer data to tailor our integrated marketing communications plan to the target market.

- Brainstormed, developed, and implemented a detailed content plan including owned, paid, and earned media.
- Identified and developed the use of all media vehicles including out-of-home, broadcast, print, and digital.
- Reported directly to the president of the company, Ann Bastianelli.

Indiana University Athletics, Bloomington, IN

May-August 2016

Ticket Sales Representative

- Actively identified, solicited, and secured season, group, and individual ticket sales by cultivating business relationships with individuals, organizations, and groups.
- Worked as part of a six-person sale team that achieved a record for the highest total sales in a 10-week period for IU Football tickets.
- Accumulated \$16,444 in total sales during the 10-week internship, 26% of the sales team's total profits.
- Performed 70-80 outbound cold calls daily to prospect for full season, single game, and group tickets.
- Contacted local business owners and set up group outings for them and their staff.
- Networked to build and maintain relationships within the community and surrounding areas to identify potential prospects.

Pacers Sports and Entertainment, Fort Wayne, IN

January-June 2013

Front Office Intern – Fort Wayne Mad Ants

- Created "proof of fulfillment" PowerPoint presentations to present to key corporate sponsors. Sponsors included: US Army, Vera Bradley, Sweetwater Sound, Meijer, Marathon, Lutheran Health Network, Kroger, Hyatt Place, Courtyard Marriott, and several other local sponsors.
- Provided customer service to previous team supporters, large group ticket sales, and new fans of the team.
- Performed merchandise inventory and calculated total units sold and revenue.

SKILLS

- Basic knowledge of Adobe Creative Suite (InDesign, Illustrator, and Photoshop)
- Intermediate knowledge of front-end languages HTML and CSS
- Google Ads and Analytics certified
- HubSpot certified (Inbound, Inbound Marketing, Content Marketing, and Email Marketing)
- Microsoft Office proficient
- Familiarity with CRM software such as Salesforce and Paciolan
- Familiarity with ticketing platforms such as Archtics
- Beginner to Intermediate knowledge of the Spanish language
- Familiarity with navigating SEC's EDGAR database for regulatory filings