

JASON ROBERT IDOINE, CFA

1900 Arch St. Apt. 425, Philadelphia, PA 19103 | (330) 606-5347 | jidoine@wharton.upenn.edu

EDUCATION

THE WHARTON SCHOOL, UNIVERSITY OF PENNSYLVANIA

Philadelphia, PA

Master of Business Administration Candidate; Major in Finance

2022-2024

- GMAT: 750 (98th Percentile)
- Membership: Wharton MBA Finance Club, Ski & Snowboard Club, Golf Club, Scotch & Whiskey Club

MAX M. FISHER COLLEGE OF BUSINESS, THE OHIO STATE UNIVERSITY

Columbus, OH

Bachelor of Science in Business Administration; Major in Finance, Minor in Economics (Honors)

2013-2017

- GPA: 3.97 | Honors Research Distinction in Finance | *summa cum laude*
- Research thesis presented at Denman Research Forum: *Effect of Activist Investing on Stock Returns in the Restaurant Industry*
- Leadership: Executive Board, Kappa Sigma Fraternity; Founding Member, Christmas in July was a student organization that collected school supplies and toys to donate to a local elementary school in Columbus, OH
- Work Experience: Part-time employee at Fisher College of Business through junior/senior year while taking classes full-time
- Awards: Pace Setter Award (recognizes top business school students, <5% of alumni); Kappa Sigma Scholar-Leader Award; Maximus Scholarship; Nationwide Insurance Enterprise Foundation Honors Program Scholarship

EXPERIENCE

RBC CAPITAL MARKETS

Solon, OH

Senior Equity Research Associate | 2020-2022

2018-2022

Equity Research Associate | 2018-2020

- Managed research utilized by buy-side for 22 publicly traded REITs; Developed investment theses and financial models to estimate earnings, analyze financials, determine price targets, and set ratings of Outperform/Sector Perform/Underperform
- Voted #6 REIT research team on Wall Street (Institutional Investor) by buy-side clients in 2021
- Pitched REIT investment opportunities to investors and RBC sales & trading; Moderated meetings between REIT executives and investors, participated on quarterly earnings calls and individually led a non-deal roadshow
- Spearheaded creation of mentorship program connecting new hires with tenured associates in coordination with research management; Program implemented across US Research, successfully fostering 20+ mentor-mentee relationships
- Engaged with research management to drive associate-focused initiatives including Factset trainings, a mentorship program, recruiting efforts and a leader interview series as a member of highly selective Associate Council
- Created REIT valuation models including both industry-wide and sub-sector specific earnings multiple models, net asset value analyses, and comps valuations by managing a 3-person associate team

Notable Research:

- Collaborated with biotech team to write unique report around impact of life science tailwinds on lab-focused real estate; Performed analysis of supply, demand, and REITs' portfolio positioning - *Life Science Imagine 2025 (2021)*
- Identified market mispricing of REIT asset driving RBC price target increase to \$16/sh from \$14/sh; REIT subsequently announced sale of asset driving share price up ~25% over following week. - *CIO Price Target Update (2021)*
- Conducted due diligence, strategic analyses and a sector outlook for two industrial REITs; Built financial models estimating net asset value, price targets and earnings; Initiated FR at Outperform, 12-month total return outperformed benchmark by 13.4%; Initiated EGP at Sector Perform, 12-month total return outperformed benchmark by 4.9% - *FR & EGP Initiations (2020)*
- Interviewed industry stakeholders and analyzed new construction and occupancy trends within seniors housing and skilled nursing markets to determine underlying strength of healthcare REITs' properties - *Healthcare REIT Pulse (Recurring)*
- Analyzed COVID related food production disruption's impact on cold storage inventories - *USDA Food Production (Recurring)*

PNC FINANCIAL SERVICES GROUP

East Brunswick, NJ

Institutional Asset Management Analyst

2017-2018

- Streamlined creation of client portfolio performance reports by building easily updatable templates in Excel
- Developed VBA tool adopted by team to improve relationship management; Allowed sales to track client information more efficiently

ADDITIONAL INFORMATION

Certifications & Licensing: CFA® Charterholder (passed all exams on first attempt), Series 7, Series 63, Series 86, Series 87
Service: Founder, Principles of Personal Finance is a financial literacy organization serving financially at-risk families in the Greater Cleveland community by teaching basics of personal finance and empowering individuals to set and achieve financial goals;
Participant, Velosano is a cycling event hosted by the Cleveland Clinic to raise funds for cancer research; Mock Interviewer, Towards Employment is an organization helping individuals with criminal records in Northeast Ohio find jobs
Interests: Ohio State sports, Bass fishing, Succulent gardening, Mechanical watch collecting, Fitness