

Jonathan Roth

Associate



Education & Certification

- B.S. Finance, International Business – Kelley School of Business, Indiana University
- Investment Banking Workshop – Indiana University
- Series 79 Certified
- Series 63 Certified

Jon currently serves as an Associate where he is responsible for conducting financial and operational analysis, developing key performance indicators, supporting value creation initiatives, constructing 13-week cash flows, analyzing working capital assessments and assisting in the overall implementation of value maximization strategies

Prior to joining Portage Point, Jon was an Investment Banking Analyst in the Strategic Capital group at Cowen, where he managed a network of financial sponsor relationships, providing actionable investment ideas and solutions to private equity and family office clients. Jon worked closely with coverage and product bankers to deliver consistent deal flow and provide expertise in various industries including consumer products, industrial services, and manufacturing. Previously, Jon worked as an Investment Banking Analyst at Fifth Third Bank working on Corporate Healthcare coverage. While at Fifth Third, he focused on analyzing and executing strategic alternatives for a wide range of publicly traded healthcare companies, including a capital raise for one of the largest U.S. acute-care providers and other financing engagements

Jon graduated with a Bachelor of Science from the Kelley School of Business at Indiana University and was a member of the Investment Banking Workshop. Jon holds his Series 63 and 79



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