

AJ Montgomery

CEO & Co-Founder



Contact Information

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Skills

- Verbal Communication
- Written Communication
- Presentation
- Financial Analysis
- Sales
- Marketing
- Product Development

A storyteller inspired to bring the light of DeFi to everyone’s phone by sidestepping middlemen to provide the best financial services, yields, and rewards. All possible by a mantra of collective vision, inspiration, and empowerment of the team and its users.

Experience

- Present - 1-2021

CEO & Co-Founder

Accrew

CEO & Co-Founder of Accrew, the member-owned mobile bank, empowers its members as shareholders and returns company profits in the form of crypto equity. Our mission is to bridge the gap between centralized finance and DeFi to provide better financial services direct to the consumer.


- 9-2020 - 6-2019

Sales Director

Investor Cash Management (ICM)

Business Developer of ICM’s white labelled Cash Management Accounts. Collaborative engagement with RIAs, Asset Managers, and TAMPs to develop a custom product, including a branded debit card, mobile application, and web portal for partners and their clients.


- 6-2019 - 7-2016

Regional Vice President

Zacks Investment Management

External Wholesaler providing SMA and mutual fund solutions for financial advisors and their clients. Experienced in covering all institutional and independent broker dealers throughout Northern California and the Pacific Northwest. Increased SMA business by 70% and mutual fund business by 430% from predecessor.


- 7-2016 - 5-2013

Internal Wholesaler

Zacks Investment Management

Inside sales supporting external wholesalers by initiating sales contacts, setting meetings, and providing sales presentations and/or consultations. Territories included the Southeast and Mid-Atlantic.



Education

- 10-2020 - 3-2021

UC Berkeley

Tech Project Management Bootcamp
- 2010-06 - 2006–08

Grand Valley State University

Double BS in Finance & Economics

Additional Activities

- Present – 1-2016

Toastmasters

Club officer board member of Michigan Avenue Toastmasters

Certificates

- 2-2012

Series 7
- 11-2012

Series 65
- 7-2016

CFA Level 1