

# AJ Montgomery

CEO & Co-Founder



## Contact Information

### Email:

[ajm@accrewmoney.com](mailto:ajm@accrewmoney.com)

### LinkedIn:

<https://www.linkedin.com/in/aj-montgomery-049a9621/>

## 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*