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Attention: Financial/Business Editor

News Advisory

Jeffrey P. Smith Joins Equities First Holdings, Business Development Group

Indianapolis, IN – With nearly 30 years of progressive experience in consumer lending, correspondent lending, and mortgage programs, Jeffrey P. Smith is an experienced professional, well-versed in financial products.

Smith is the newest financial expert to join the team of Equities First Holdings, LLC, a full-service, private, nonpurpose lender that specializes in securities based lending to investors in need of prompt funding or long-term cash management.

Equities First Holdings, LLC Founder & President Al Christy, Jr., says, “Jeffrey’s diverse experience in multiple sectors of the financial market will be a tremendous benefit for our clients. His proven skills in mortgage and taxation matters will help us continue to build on our successes.”

As a member of the Business Development Group, Smith’s experience in marketing and program development will be utilized to seek out new financial relationships in retail and institutional markets. Additionally, he will use his mortgage experience to help grow Equities First Holdings service offerings to its client companies.

“I’m excited to have the opportunity to become a part of Equities First Holdings team, and have the opportunity to bring my experience in the mortgage sector to their unique business model,” says Smith.

Smith earned an MBA from Miami University (Oxford, Ohio) with a concentration in finance, and a bachelor’s degree in accounting, from Miami University. He holds Series 7 and a Series 63 General Securities licenses.

Smith has 28 years of mortgage, banking and tax advisory experience, including experience with Bank One, Prudential Home Mortgage, Salomon Brothers and Touche Ross & Company. He most recently worked at Goldman, Sachs & Co. as Vice President, Fixed Income, Mortgages where he was responsible for the relationship management of key primary accounts and all accounts in the Midwest region. While at Goldman, Sachs he built and launched the firm’s mortgage correspondent program, and added over 100 accounts in the first year of operation.

Equities First Holdings, LLC is a full-service, private, nonpurpose lender that specializes in securities based lending to investors in need of prompt funding.

Equities First Holdings provides terms based on its evaluation of the risk and future performance associated with the stocks, bonds or U.S. Treasuries to be pledged as collateral to maximize and maintain complete, yet proprietary flexibility of the equity-loan process.