

## Jason Bolt, CFA, AM

Senior Associate and Shareholder



**Jason Bolt** has been an Associate with Columbia Financial Advisors, Inc. since 2007. He specializes in assisting with all aspects of appraisal engagements for financial reporting compliance, intangible asset valuations and allocations, and stock option valuations. He also has experience in assisting with appraisal engagements for a variety of other purposes. He has extensive experience and acumen with financial modeling and various databases and other sources to retrieve and utilize relevant peer company business, financial and market data and industry and economic data for appraisal engagements.

P: 503.222.0562

F: 503.222.1380

[jbolt@cfai.com](mailto:jbolt@cfai.com)

---

Prior to joining Columbia Financial Advisors, Inc. in 2007, Mr. Bolt was an Financial Analyst with Merix Corporation where he was responsible for financial modeling of stock options and implementation of an employee stock purchase plan. Prior to joining Merix Corporation in 2006, he was an Equities Trader with Trillium Trading, LLC.

Mr. Bolt is an Accredited Member of the American Society of Appraisers designated in Business Valuation and has completed the Chartered Financial Analyst (CFA) program administered by the CFA Institute. Mr. Bolt earned his Bachelor of Science in Applied Economics and Management from Cornell University in 2005.

Mr. Bolt's experience stems from his tenure at Columbia Financial Advisors, Inc., his professional experience as an equities trader and an analyst as well as his education at Cornell University where he studied corporate finance, investments, portfolio theory, and economics. His appraisal experience includes individual Client case management and all aspects of appraisal engagements. His valuation experience includes appraisal engagements for a variety of purposes including gift and estate tax, 409A valuation, and ESOP purposes.