Abraham N. Doe

Philadelphia, PA 19119 ● (215) 888-1535 ● abrahamdoe@gmail.com

Skills & Talent

Artificial Intelligence/ Machine Learning/ Large Language Models, Data Science & Analytics, Execution, Financial Planning, iOS Development, Persistence, Portfolio Management, Problem Solving, Python (Pandas, Plotly, Scikit-Learn, TensorFlow), Research, Strategy, Value Investing

Experience

Vanguard, Malvern, PA, July 2021 – January 2025

Corporate CFA Program, December 2023 —January 2025

- Developed an algorithm for a portfolio management process that sets a strategic asset allocation based on the Capital Asset Pricing Model identifying optimal weights for each portfolio asset.
- Automated financial analysis research process with an algorithm that returns critical factors for any NYSE or NASDAQ listed equity security.

Retirement Education Specialist, December 2023 – January 2025

- Peer reviewed and lead over 50 client meetings on financial wellness, savings and investments, and retirement planning.
- Consulted one-on-one with employee participants of institutional clients that have up to $5B in assets under management on tax-efficient savings strategies, asset allocation, and common size budgeting.

Client Representative Associate, July 2021 – December 2023

Education

University of Pittsburgh School of Law, J.D. | **Pennsylvania State University**, B.A.

Licenses & Certifications

Financial Industry Regulatory Authority (FINRA), Securities Industry Essentials (SIE), Series 7 General Securities Representative, Series 63 Uniform Securities Agent.

New York University School of Professional Studies, Certificate in Financial Planning.