Jeremy J. Bourne, CFA

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Summary:

Business analytics graduate student with six years of experience working with financial data who has a passion for solving complex business problems and is eager to demonstrate how data science can add value to the business community.

Education:

William & Mary, Raymond A. Mason School of Business, Williamsburg, Virginia   Expected May, 2019
Master of Science, Business Analytics, 3.8/4.0

Christopher Newport University, Joseph W. Luter, III School of Business, Newport News, Virginia   May, 2012
Bachelor of Science in Business Administration, Finance; Minor in Communication Studies

Maastricht University, Study abroad program with a focus in International Management   Summer 2011
Maastricht, The Netherlands

Relevant Data Analysis Projects:

Langley Federal Credit Union Capstone Project: Analyzed $1 billion in auto loans to develop risk-based pricing model

Bon Secours Healthcare Project: Comprehensive review of CMS data to provide insights about insurance claims drivers

Kickstarter Project: Used statistical learning models such as LDA, QDA, Logistic Regression, and Random Forest to predict the success of varying Kickstarter campaigns and tested the significance of various independent variables

Relevant Coursework:

Optimization · Machine Learning I & II · Artificial Intelligence · Risk Management · Portfolio Management · Big Data · Data Visualization · Public Speaking · Database Management · Intermediate Corporate Finance · Financial Institutions · Intermediate Probability and Statistics · Principles of Accounting I & II · Software Packages & Business Applications ·

Technical Skills:

Python · statistical computations using R · Spark-Scala · MapReduce · web-scraping · SQL · text analytics using NLTK · Alteryx · data visualization in Tableau · heuristic algorithms · Bloomberg · Factset · all Microsoft Office Suite programs with an advanced understanding of Excel

Experience:

U.S. Trust, Bank of America
Portfolio Manager Associate, Richmond, Virginia   September, 2015 – August, 2018

- Collaborated with a local team of 5 Portfolio Managers as well as executives to continuously model and monitor the variance of the underlying portfolio assets with total AUM in excess of $4 billion
- Tested portfolio optimization models to identify and mitigate risk for clients while simultaneously implementing top-of-the-house tactical asset allocation decisions on multi asset class portfolios
- Conducted research as retail sector analyst for proprietary REIT Income Strategy covering individual real estate firms and evaluated profitability relative to the peer group and articulated my recommendations to the PM
- Researched and executed due diligence on external managers on an ongoing basis to verify objectives are properly aligned with the goals of the client as outlined in the Investment Policy Statement

U.S. Trust, Bank of America
Portfolio Analyst, Chevy Chase, Maryland   January, 2013 – September, 2015

- Provided analytical and administrative support to multiple Portfolio Managers in the Washington D.C. Market with over $3 billion in assets under management
- Ran asset allocation analysis and created client facing reports which evaluated performance and provided recommendations to Portfolio Managers to mitigate risk and bring portfolios back in line with tactical targets
- Devised operational risk management methodologies; liaised with senior management to drive standard risk by maintaining database of compliance including Investment Policy Statements

Research Intern for Midwest Renaissance Fund   Summer 2012

- Evaluated business plans and created a system of due processes for start-ups that required mezzanine capital
- Conduct research and wrote investment sector reports that influenced business decisions to determine whether capital outlays would create positive net value to the fund

Additional Information:

- Joseph W. Luter, III School of Business Board of Advisors, Member   Present
- CFA Society of Virginia – CFA Research Challenge Sponsor for CNU   2019
- Senior Vice-President of Kappa Delta Rho   November, 2010 – November, 2011
  - North American Inferfraternity Conference's Chapter of Distinction 2012