



BUSINESS ANALYST

Hello, I'm Jake White

Technical Business Analyst with over 6 years of experience in the FinTech and Asset Management sectors. Expert in bridging technical data engineering with business strategy through SQL, Python, and AI-driven solutions. Proven success in designing internal data quality tools, defining technical service frameworks, and managing complex data migrations for institutional clients.

Skills

Languages

Python

SQL (PostgreSQL, SQL Server)

HTML

CSS

JavaScript

Tools & Platforms

Google Cloud Platform (GCP)

Alteryx

Git/GitHub

Pandas/NumPy

Salesforce CRM

Docker

Django

Competencies

Data Analysis

Database Design

Technical Requirements

Client Onboarding

Process Optimization

AI Integration

Master Data Management

Experience



Business Analyst

Synfinii (formerly SalesPage Technologies)

Oct 2025 – Present

- **Product Owner - Sightseer:** Engineered and deployed an internal data monitoring and quality tool using Python and SQL that utilizes automated impact analysis to determine the urgency and priority of failures.
- **Systems Architecture:** Architected the Synfinii Delivery Service definitions, standardizing technical onboarding for internal team members and improving service consistency across the Synfinii platform.
- **AI Strategy:** Integrating Generative AI workflows to streamline requirements gathering and enhance research for complex client solutioning.



Solutions Analyst

SalesPage Technologies

Jan 2023 – Nov 2025

- **Technical Scoping:** Authored comprehensive specifications for 50+ platform features, accelerating the development cycle by 150% through rigorous requirement gathering.
- **Data Onboarding:** Collaborated with Asset Managers to integrate and leverage Discovery Data, FinTrx, and AdvizorPro client entity data for enhanced distribution strategies.
- **Process Automation:** Migrated 3 key clients to modern data sources, automating tracking and reducing manual operational effort by 89%.
- **Performance:** Improved key performance indicators for sales and marketing strategies by 50% through data-driven solutioning and technical audits.



Associate Solution Analyst

SalesPage Technologies

Jan 2020 – Jan 2023

- **Enterprise Integration:** Directed the technical upgrade for Nuveen, including the definition of requirements for their complex Salesforce environment integration.
- **Client Enablement:** Trained and onboarded institutional clients onto the SalesPage Enterprise Platform, focusing on platform utilization, data quality, and best practices.

- **Service Expansion:** Successfully onboarded clients to LumaSuite, Advisor Atlas, and SalesPage Resolution Services.



Undergraduate Research Assistant

Western Michigan University

2017 – 2019

- **Data Integrity:** Operated a particle accelerator and resolved complex technical issues with apparatus, ensuring 99.9% data integrity for experimental outputs.
- **Scientific Protocol:** Designed crystal growth protocols and programmed specialized furnaces for superconductivity testing, focusing on Lead Sulfide crystals.

Education & Certifications



Western Michigan University

Kalamazoo, MI | April 2019

B.S. Physics

B.S. Applied Mathematics

Certifications

Gen AI: Navigate the Landscape

Introduction to AI

Client Needs and Software Requirements

Projects

Data Quality Check Platform

SQL Python GCP

- Engineered and deployed a robust data quality check platform, enforcing database adherence to 50+ predefined business rules.
- Automated validation processes, improving data integrity/consistency across 5 critical client databases (reduced errors by 92%).
- Leveraged advanced SQL for rule definition and validation logic, boosting overall data reliability by 90%.

Hobby Habbit (Hobby Tracker)

Django PostgreSQL Docker

- Building a modular application using Django, PostgreSQL, and Docker to track collaborative hobby milestones with friends using an object-oriented approach.