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.