JACOB WHITE

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Portfolio

PROFESSIONAL SUMMARY

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.

TECHNICAL CORE COMPETENCIES

- **Analysis & Methodology:** Technical Requirements Writing (PRDs/User Stories), Impact
  Analysis, Master Data Management (MDM), Process Optimization.
- **Data & Programming:** SQL (PostgreSQL, SQL Server), Python (Pandas, NumPy,
  Scripting), Database Design (Stored Procedures, Views), GCP, Alteryx.
- **Tools & Integrations:** Salesforce CRM, Git/GitHub, Docker, Django, Data Quality Tools.
- **Specialized Domain:** Asset Management Distribution Data, Entity Data (Discovery Data,
  FinTrx, AdvizorPro), Technical Service Definition.

PROFESSIONAL EXPERIENCE

Synfinii (formerly SalesPage Technologies) | Kalamazoo, MI

Business Analyst | *October 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 | *January 2023 – November 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 | *January 2020 – January 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.

Western Michigan University | Kalamazoo, MI

Undergraduate Research Assistant | *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.

KEY TECHNICAL PROJECTS

- **Data Quality Check Platform:** Engineered a GCP-based platform using advanced SQL to enforce 50+ business rules, reducing client database errors by **92%.**
- **Hobby Tracker (In Development):** Building a modular application using **Django, PostgreSQL, and Docker** to track collaborative hobby milestones with friends using an object-oriented approach.

EDUCATION & CERTIFICATIONS

- **Bachelor of Science, Physics** | Western Michigan University
- **Bachelor of Science, Applied Mathematics** | Western Michigan University
- **Certifications:** Gen AI: Navigate the Landscape, Introduction to AI, Client Needs and Software Requirements.