

KERRY KOVACIK

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[LinkedIn](#) | [Portfolio](#) | [GitHub](#)

PROFESSIONAL SUMMARY

Analyst experienced in Excel, Python and SQL with a background in finance. Self-starter driven to dive down the rabbit hole to research, investigate and discover trends in data and reporting. Well versed in building, organizing, auditing and analyzing data to generate reports and findings to executives and stakeholders. Brings a love of learning, coupled with high attention to detail. Plays an integral part in current cross-functional team, applying these skills to research and manage complex and intricate projects, promote communication and follow through to completion.

SKILLS

Excel
VBA / Macros
ETL
Python
SQL

Tableau
Microsoft Office
G Suite (Google Apps)
Salesforce
Data Manipulation

Investment Analysis
Vendor Management
Data Analysis & Auditing
Project Management

EXPERIENCE

Analyst - Investments, 2013 - Present

[Merrill Lynch](#) – Austin, TX

Create and analyze reports and visualizations for 401(k) cost-benefit analysis, sales commissions and goal tracking, compensation deferrals, business expenses and reimbursements, etc. Trade investment accounts with over \$400 million in assets under management.

- Troubleshoot and audit data for discrepancies and inaccuracies in internal and external systems, tools and reporting resulting in thousands of dollars in financial savings for our 401(k) HR partners.
- Coordinate retirement plan conversion, onboarding and continuous support and vendor management.
- Build reports and workflows for trading of managed portfolios which has led to a reduction in trade errors.
- Achieved internal Top 100 in Excellence award 6 years running by interpreting data into actionable tasks for teammates resulting in reward trips and additional compensation.

Executive Assistant / Office Manager, 2006 - 2013

[Robert J. Eckhardt & Co., P.C.](#) – Melville, NY

Managed all interoffice operations and processes, such as coordinating multiple teams for tax filing deadlines to ensure no late or missed client submissions to the Internal Revenue Service (IRS).

- Calculated internal rates of return, portfolio dollar weighted expenses and assets allocations for financial accounts.
- Manage accounts receivable and payable.
- Coded and input expenses to generate financial statements.
- Completed individual, sales and payroll taxes as well as W2 and 1099 forms.

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EDUCATION & CERTIFICATIONS

The Data Analysis & Visualization Boot Camp

[The University of Texas at Austin](#) – Austin, TX

A 24-week intensive certificate program focused on gaining technical programming skills in Excel, VBA, Python, R, JavaScript, SQL Databases, Tableau, Big Data and Machine Learning.

Chartered Retirement Planning CounselorSM (CRPC)

[College For Financial Planning](#) - Austin, TX

Professional Designation

Series 7, 66, 6, 63

[FINRA](#)

Professional Licenses

Bachelor of Arts, Psychology

[St. Joseph's College](#) – Patchogue, NY

Undergraduate Degree