

Professional Experience

Shakely Consulting

February 2022 – Present

- Developed and implemented a third-party integration between an AI-powered invoicing platform and Yardi Systems to streamline the transfer of invoice, vendor, and document data via Yardi's SOAP-based web service. This involved training both the AI and engineering teams on the detailed processes of importing invoice data and supporting documents into Yardi, as well as performing vendor data upserts. The integration enhanced automation and accuracy in financial data management, improving overall operational efficiency for clients.
- Designed and implemented ETL pipelines using C# and Azure Functions to ingest CSV exports from SQL procedures, convert them to Excel, apply table mappings, filtering logic, and generate visual reports with embedded charts.
- Automated data processing and job scheduling using PowerShell and Python for large-scale financial reporting systems on Microsoft SQL Server, improving system efficiency and performance monitoring.
- Led end-to-end database optimization efforts, including access policy configuration, data integrity validation, and advanced SQL query tuning for clients in real estate and fintech sectors.
- Designed and implemented a PowerBI business intelligence solution for a Financial Technology startup in the Credit Union industry, a fintech platform that helps users find and compare credit union loans. This project involved integrating data sources to create dynamic, real-time dashboards and reports that provided actionable insights into lending performance. The solution helped the client as well as credit unions expand their reach, enhance loan offerings, and target a younger demographic by improving decision-making capabilities through comprehensive data analytics.
- Developed a lease abstracting platform written in React, Typescript, Next.js and deployed via Vercel, capable of parsing Excel datasets, enabling real-time web-based grid manipulation, and automated exportation to CSV or Excel for immediate SFTP-based Yardi integration. Additionally, automated task and schedule configurations were instituted for uninterrupted data transfer.
- Utilized Azure Functions, WebJobs, and Blob Storage, along with code written in C#, to create an integration solution for companies transitioning property managers for Yardi-to-Yardi conversions, which included mapping properties, GL accounts, books, and tenants, between databases, and making the process repeatable to perform these migrations starting with monthly migrations and transitioning to weekly.
- Used similar Azure functionality to migrate 3 separate clients from QuickBooks to Yardi.
- Developed a data extraction solution that employed a stored SQL procedure to aggregate and export all invoice metrics related to insurance claims from purchase orders. The data, in CSV format, was seamlessly incorporated into the Origami Risk Management Software.
- Developed an API-driven integration to facilitate the seamless transfer of payroll data from ADP to Yardi as journal entries. Utilized custom SQL procedures to reformat the data for Yardi compatibility.

Liberty Military Housing | Software Engineer

January 2020 – February 2022

- Migrated a suite of 30+ SQL-based custom reports into Yardi's Spreadsheet Reporting (YSR) technology. The transformation necessitated intricate SQL queries and templating, resulting in a more intuitive and user-centric data visualization mechanism.
- Created custom workflows and leasing solutions within Yardi to improve operational tracking for residential units.
- Led initiatives to enhance reporting and data-driven decision-making for Military Housing portfolios.

Hott Solutions | Software Engineer and Project Manager

May 2018 – January 2020

- Managed end-to-end implementations of Yardi Systems Investment Management and Advanced Budgeting software.
- Led functional workshops with asset management clients to design workflows, investment structures, and reporting.
- Developed data conversion strategies, including large-scale migrations from Entrata to Yardi.
- Built APIs supporting real-time data transfer for major clients including Amazon.com and Rentlytics.

Yardi Systems | Technical Consultant

January 2013 – May 2018

- Spent 2.5 years on the Investment Management team, supporting REITs, institutional investors, and owner-operators by tracking cash flows across complex investor-investment hierarchies and designing financial consolidation and elimination processes between general partners and properties.
- 3 Years as part of the Advanced Budgeting team, implementing Commercial and Residential clients with tailored market lease assumptions, and expense models.
- Collaborated directly with clients to analyze in-place leases, forecast NOI, and evaluate capital adjustments. Developed advanced reporting frameworks to enable data-driven decision-making and ensure compliance with financial goals. Additionally, supported variance analysis and created automated workflows for budget tracking and reconciliation.
- Delivered customized workflows for tracking capital contributions, distributions, and complex investment structures. Developed detailed portfolio performance reports, including IRR and ROI analysis, cash flow modeling, and fund-level KPIs. Collaborated with clients to streamline financial reporting processes and ensure alignment with GAAP standards. Provided hands-on support for multi-entity, multi-currency consolidations, fund-level audits, and financial data migrations to Yardi.
- Created custom SQL-driven tools, including stored procedures and dynamic queries, to automate financial reporting, KPI tracking, and variance analysis for clients with diverse operational needs.
- Served as a key technical consultant for JP Morgan Asset Management's transition from MRI to Yardi, with frequent on-site visits to ensure a seamless migration and alignment with their operational needs.

Education

California Polytechnic State University – San Luis Obispo
Bachelor of Science | Business Administration, *Accounting & Finance*

August 2008–December 2012