

## WORK EXPERIENCE

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### **State Street Global Markets, State Street Associates, Cambridge, MA**

*Quantitative Researcher, 2021 – 2023*

- Revamped team's Python code infrastructure to enhance client reporting, indicator creation, and ad-hoc client requests
- Enhanced flexibility by optimizing our team's market indicator API for customized data requests in Python
- Collaborated with industry leaders and academics to co-author a white paper on integrating securities lending and ESG
- Presented at two State Street Annual Research Retreats to a hundred clients

### **Professional Development Rotational Program, Boston, MA**

*Senior Associate, 2019 – 2021*

- Built a real-time market monitoring dashboard using Python (dash package), HTML, CSS, JavaScript, and SQL
- Rotated through four groups within Global Markets - Securities Finance Algorithmic Trading Group, Quantitative Risk, Currency Management, State Street Associates

### **Fidelity Investments**

*Intern, Family Office Services, Boston MA, Summer 2018*

*Intern, Market Data Services, Merrimack NH, Summer 2017*

- Provided data analysis and reporting for Portfolio Communications, Data Strategy, and Portfolio Analyst teams
- Led an independent project to automate market data reporting and searching using Splunk software
- Worked with Client Experience reporting software to reduce miscalls for over 300 clients

### **Bentley University Service-Learning, Waltham, MA**

*Special Project Assistant, 2016 – 2018*

- Designed and created a functional user interface for Bentley's Service-Learning and Civic Engagement Office to track 1,000+ students/year and 60+ community partners
- Collaborated with professors and university office staff to gather requirements, prioritize functions, and track progress

## EDUCATION

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### **Bentley University, Waltham, MA**

BS, Major Finance, Minor Computer Information Systems, cum laude, May 2019

### **Vienna University of Economics and Business, Vienna, Austria**

Exchange Student, Fall 2017

### **Bentley Investment Group – Waltham, MA**

*Energy Sector Analyst, Fall 2016 – Fall 2018*

- Utilized Bloomberg Terminal and FactSet to review SEC filings, earnings releases, investor presentations, and research reports.
- Developed and presented stock pitches to 100+ member club and executive board

**Activities:** Varsity Men's Lacrosse, Club Hockey Team, Trading Society-CIO, Campus Ambassador, Parmenter Food Pantry

## TECHNOLOGY SKILLS & CERTIFICATIONS

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Technology Skills: Python, JavaScript, SQL, Git, GitHub, HTML, CSS

Certifications: Bloomberg Market Concepts

## PUBLISHED WORKS

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Whitmore, T., Carvalho, S., Wang S., (2021). Integrating ESG Considerations into Securities Lending. *The Risk Management Association*