Tyler Norman

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**SUMMARY**

Working financial professional and Master of Science in Finance graduate with strong alignment with self-discipline, self-improvement, and process improvement. Most comfortable with intellectual and challenging environments, which require constant change and adaptation to stay relevant with competition. Exacting in work and methods, and desire to optimize and update workflows.

**SKILLS**

* Advanced proficiency in coding languages, such as Python, HTML, XML, VBA, and programs such as Excel, and Office
* Expert in fundamental and comparative analysis, valuation of debt and equity, and modern quantitative methods
* Published in *The Psychological Record* for applications of delay discounting, statistics, and data analytic methods.

**PROFESSIONAL EXPERIENCE**

**Victory Capital**

**Compliance Analyst– San Antonio, TX** **06/30/2025 – Present**

* Created and optimized email surveillance lexicons using ML & data analytic methods, reducing workload by 2+ hours daily.
* Created macro enabled workbooks to wrangle data from multiple employee trade reports, reducing workload by 1+ hour.
* Tested WSPs and updated language and corporate procedures to uphold regulatory compliance and improve readability.
* Tested lexicon exposure to stated supervised regulatory requirements, reducing firm exposure to legal risk by +2 million.
* Used JavaScript to create disclosure rules in Red Oak, improving communication between marketing and compliance dept.

**Carlos Alvarez College of Business, UTSA**

**Graduate Teaching Assistant– San Antonio, TX** **06/15/2024 – 12/14/2024**

* Administer and grade coursework on real estate valuation and ratio analysis for 25 real estate finance students.
* Grade and provide feedback on WACC, IRR, portfolio theory, and DCF analysis, etc. for 45 college seniors’ capstone cases.
* Teach and grade financial concepts (annuities, perpetuities, etc.) to 250+ students enrolled in principles of business finance.
* Tutored finance students outside the classroom, enhancing their understanding of key investment and market concepts.

**Graduate Research Assistant– San Antonio, TX**  **09/01/2023– 05/11/2024**

* Created comprehensive literature reviews on strategic alliances and their purposes in the healthcare sector.
* Designed Python scripts to scrape SEC EDGAR and IRS databases, automating data collection for research.
* Used BERT natural language processing models to classify information within EDGAR HTML files.
* Compiled data into Excel files for further analysis, and prepared reports for supervising professor.

**JPMorgan Chase & Co.**

**Account Specialist – San Antonio, TX** **10/03/2022– 08/21/2023**

* Assisted retail banking clients with everyday products such as demand deposit accounts and certificates of deposit.
* Communicated with 170 clients daily, ensuring compliance with commercial banking regulations while addressing their financial needs.

**EDUCATION**

**The University of Texas at San Antonio​ 08/21/2023 –12/14/2024**

*Master of Science – Finance GPA 3.91*

**The University of Texas at San Antonio​ 08/22/2016 -05/14/2019**

*Bachelor of Arts -- Psychology GPA 3.89*

**CERTIFICATIONS/EXAMS**

**CFA Institute 08/01/2024 - Present**

*CFA level III Candidate, CFA level 1I Exam, Pass, CFA level I Exam, Pass*

**FINRA 05/01/2024-05/01/2028**

*Standards and Industry Essentials (SIE), Series 7, Series, 24*

**Bloomberg Awarded 12/01/2024**

*Bloomberg Market Concepts Certificate*

**PROJECTS/PUBLICATIONS**

SEC EDGAR and IRS 990 Database data collection tools. Created through Python. [Link](https://github.com/GRA-2024-Spring/DataCollectionTools).

Single Index Model using CAPM, yfinance, and Python. [Link.](https://github.com/TylerNormanS/Index-Model/blob/main/PM%20FINAL.ipynb)

Romanowich, P., Igaki, T., Yamagishi, N., & Norman, T. (2021). Differential associations between risky cell-phone behaviors and discounting types. The Psychological Record, 71(2), 199–209. [Link](https://doi.org/10.1007/s40732-020-00446-7).