Brian Buchanan

Jamaica, NY

[Portfolio Website](#) | [GitHub](#) | [Linkedin](#)

Education

Baruch College — B.A., Actuarial Science   **May 2024**

Queensborough Community College — A.A.S., Accounting   **May 2024**

Additional Certifications & Training

- **Securities Industry Essentials (SIE)**
- **Life, Health & Medicare Credentials**: Life & Health Insurance License — New York (Resident); New Jersey & Florida (Non-Resident) • AHIP Medicare Certification — Completed
- **Professional Insurance Training:** Medicare fundamentals, Medicare Advantage & Supplement plans, Long-Term Care (LTC) planning, Social Security basics, suitability standards
- **Relevant Quantitative Coursework:** Theory of Interest • Probability • Short-Term Insurance Mathematics I & II • Inferential Statistics • Corporate Finance • Business Statistics
- **Aquatics Certifications (YMCA):** YMCA Lifeguard Certification • CPR/AED • First Aid • YMCA Swim Instructor
- **Studying:** Exam FM and Series 7

Key Skills

- **Financial & Market Acumen:** Financial Modeling, Risk Scenario Analysis, Portfolio Optimization (Mean–Variance), Risk–Return Analysis, Volatility & Correlation Analysis
- **Data Tools:** Excel, Power BI, SQL, Python, Tableau
- **Development and Analysis Tools:** Visual Studio Code, Jupyter Notebook, PostgreSQL (pgAdmin / psql).
- **Core Competencies:** Quantitative Analysis, Problem Solving, Client Needs Assessment, Relationship Management, Regulatory Compliance

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Experience

Bankers Life - Bankers Life   **Feb. 2025-Aug. 2025**

- Educated clients on Medicare (Original Medicare, Medicare Advantage, and Supplement plans), Long-Term Care (LTC), and life insurance options, clearly explaining coverage differences, costs, and tradeoffs
- Analyzed individual financial situations, healthcare needs, and retirement goals to tailor insurance solutions aligned with long-term protection and asset preservation
- Assisted clients through the Medicare enrollment and insurance application process, ensuring suitability and regulatory compliance
- Developed working knowledge of Term, Whole Life, Universal Life, and variable insurance products, including appropriate use cases and limitations

- Completed structured training in Long-Term Care planning, Social Security fundamentals, and Medicare cost structures
- Supported onboarding and training of new hires after completing initial training, assisting with product knowledge and appointment preparation
- Prospected and called leads to schedule appointments, managing a full self-directed calendar of client meetings
- Conducted in-person and virtual appointments, traveling extensively across Queens, Nassau County, and Suffolk County to meet clients
- Educated clients on asset protection strategies and referred them to licensed financial advisors when discussions extended beyond insurance-only scope.

YMCA - Lifeguard/Shift Lead   **Mar. 2019-Apr. 2020; May 2023 - Present**
- Supervised daily pool operations and staff, ensuring NYC aquatic safety and regulatory compliance
- Performed water rescues and first response to medical emergencies throughout the facility in accordance with emergency protocols
- Tested and monitored pool chemical levels (chlorine, pH) to maintain safe water conditions and compliance standards
- Coordinated staff scheduling and timekeeping, assisted with payroll accuracy, and managed shift coverage
- Served as primary point of contact for patron and parent communication and taught water safety and stroke fundamentals as a certified YMCA Swim Instructor, building confidence and comfort in the water

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Projects and More

- **Car Insurance Claim Risk Modeling (Python)**
  Developed an interpretable logistic regression model to predict claim probability and segment policies into risk tiers to support underwriting and risk-selection decisions.
- **SQL Segmentation Pack — Customer Value & Risk Analytics (PostgreSQL)**
  Built a structured SQL framework to analyze customer value and behavioral risk, identifying operational risk signals and proposing data-driven process improvements to mitigate financial exposure.
- **Subscription Analytics Dashboard — SaaS Case Study (Excel)**
  Created a professional Excel dashboard computing core subscription KPIs (NRR, churn rate, ARPU), translating raw transactional data into insights on revenue volatility and retention stability.
- **Mathematics Tutoring — Algebra & Fundamentals (Volunteer)**
  Provided free one-on-one algebra tutoring, strengthening student understanding of mathematical foundations through clear explanations, problem breakdowns, and confidence-building support.