

Brian Buchanan

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Summary

Finance and data enthusiast skilled in Python and Excel modelling, with actuarial science training and practical experience in financial needs analysis. I build data-driven tools and dashboards to support decision-making in finance, insurance and analytics — now seeking a role as a Finance · Data · Python Analyst where I can leverage modelling, statistical insight, and domain knowledge.

Education

Baruch College (CUNY)

B.A., Actuarial Science (STEM-Focused Program)

New York, New York

May 2024

Queensborough Community College (CUNY)

A.A.S., Accounting

Bayside, New York

May 2020

GPA: 3.145

Key Skills

Data & Programming: Python (pandas, NumPy, matplotlib), basic SQL, Jupyter Notebooks

Finance & Modeling: Loan amortization, Monte Carlo simulation, time value of money, bond/interest math

Analytics & Tools: Excel (pivot tables, functions, dashboards), data cleaning, scenario & sensitivity analysis

Domain Knowledge: Actuarial mathematics, insurance products, financial regulation (SIE), life & health licensing

Communication & Client Insight: Needs assessment, visual storytelling, problem-solving for clients

Experience

Bankers Conseco Life Insurance Company

Rosedale, NY

Financial Professional

Feb. 2025 - Aug. 2025

- Conducted client financial needs assessments and presented insurance-based risk mitigation strategies using Excel scenario modeling.
- Built simple financial projection models to visualize retirement income gaps, premium affordability ranges, and long-term cost impact.
- Prospected and converted leads through targeted outreach, resulting in increased booked appointments and expanded referral flow.

YMCA

Jamaica, NY

Lifeguard

Mar. 2019 - Apr. 2020; May 2023 - Present

- Supervised aquatic safety operations and team training for up to 40 patrons per session; achieved zero safety incidents under my watch.
- Delivered CPR, first-aid and emergency response training to staff, reinforcing risk-management and situational readiness across the team.

Certifications: YMCA Lifeguard, BLS/CPR

Projects

Loan Amortization Model (Excel): Built FM-style amortization schedule with principal/interest separation and balance decline visualization.

Monte Carlo Investment Simulation (Python): Modeled 1,000 return paths to analyze distribution, median results, and downside risk outcomes.

Certifications

- Securities Industry Essentials (SIE) — FINRA (Feb 2025)
- New York Insurance Producer – Life, Accident & Health — NYS Dept. of Financial Services (Feb 2025)
- New Jersey Insurance Producer – Life, Accident & Health; Variable Life & Variable Annuity — NJ Dept. of Banking & Insurance (May 2025)
- Florida Insurance Producer – Life, Health; Variable Life & Variable Annuity — Florida Dept. of Financial Services (Apr 2025)

Relevant Coursework & Professional Training

- Relevant Coursework: Theory of Interest · Intro to Probability · Short-Term Insurance Mathematics I & II · Mathematics of Inferential Statistics · Algorithms, Computers & Programming · Corporate Finance · Business Statistics
- Professional Training: AHIP 2026 Medicare + FWA · NAIC Best Interest Annuity Suitability (FL & NJ) · NY 4-Hour Annuity Training for Producers