Brian Buchanan

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Summary

Finance and data professional with actuarial science background, using Python and Excel to analyze data, model outcomes, and support operational and financial decision-making. Open to roles across finance, analytics, insurance, or business intelligence.

Education

Baruch College (CUNY) — **New York, New York**
B.A., Actuarial Science (STEM-Focused Program) — May 2024

Queensborough Community College (CUNY) — **Bayside, New York**
A.A.S., Accounting — May 2020

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 charts/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, simplifying technical data into decision value

Experience

Bankers Conseco Life — **Feb. 2025 - Aug. 2025**
Financial Professional

- 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 — **Mar. 2019 - Apr. 2020; May 2023 - Present**
Lifeguard

- 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 support enhancing facility readiness and risk control
  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

- Coursework: Theory of Interest · Intro Probability · Short-Term Insurance Mathematics I & II · Inferential Statistics · Algorithms, Computers & Programming · Corporate Finance · Business Statistics
- Training: AHIP 2026 Medicare + FWA · NAIC Best Interest Annuity Suitability (FL & NJ) · NY 4-Hour Annuity Training
- Macquarie University — Statistics & Data Analysis Specialization (In Progress Completion)