

## PROFESSIONAL

CustomInk  
Fairfax, VA  
*Senior Data Analyst*  
(July. 2019 – Present)

Worked with Sales and Stores to validate and discover new sales opportunities that led to incremental revenue of 8 million dollars.

- Built the Stores Retail Model to predict first year sales by leveraging a multilinear regression approach to help the real estate team identify high value locations.
- Created a Tableau dashboard that monitored the objective and key results of each of the sales channels. This dashboard is used by sales leadership to monitor and diagnose issues with the business.
- Used SQL cleaning techniques to attribute phone level data back to customer account records. This ability allowed a multitude of analytics to be performed including understanding high value product performance and phone cannibalization among the sales channels.

Huddl  
Washington, D.C.  
*Portfolio Manager*  
(January. 2018 – June 2019)

Co-Founded Huddl, the first platform that turns your social network into an investment network, and unlocks access to premium products and services historically available only to the wealthy.

- Advised on the successful submission and approval of an SEC-registered investment advisor that leverages modern portfolio theory to offer automated ETF/Crypto portfolios.
- Worked closely with engineers to develop the first financial marketplace that brings premium products to the average investor.

Freddie Mac  
McLean, VA  
*Manager Investment Capital Markets*  
(April. 2014 – January 2018)

Worked as a Mortgage Services Technology Manager to illuminate market inefficiencies, automate tasks, and identify gaps in process. This led to making money for the company, reduce errors, and saving money.

- Utilized multiple databases and Bloomberg formulas to build an Adjustable Rate Mortgage (ARM) spreadsheet that tracks individual loans, market securitization, and market color volume in order to help price annually \$18 billion dollars in ARMs.
- Leveraged SQL, a thorough understanding of databases, and VBA to distribute market prices to a list of mortgage originators saving a trader 30 minutes a day and prevented mistakes caused by user fatigue.
- By understanding waterfall logic methodology was able to rank order loan packages based on specific attributes, assign a market level, and in turn increasing efficiency by 80% and earning an Above and Beyond Award.
- Created a profit of \$500k by discerning how 5/5 ARMs are perceived in the market from a liquidity perspective and accurately priced these bonds based off similar products.

As a Pipeline Technology Operations Manager I helped managed an approximate \$125 billion mortgage pipeline. In doing so was able to identify opportunities to optimize the portfolio and identify pricing errors that lead to saving money for the company.

- Assembled the Spot Bid Recon program that leveraged Python, SQL, and waterfall methodology to slot loans and compare pricing with their original contract. Program saved company over \$250k per year.
- Utilize data analytics to identify loans not showing in a position summary tool. This prevented traders from mis-hedging funds, saving \$5 million per month.
- Identified profits made by loans that were delivered early; leveraging SQL and the cost of funds rate to calculate the interest rate float. Quantifying profit and the opportunity to help clients efficiently manage their pipeline.

As a Cash Window Portfolio Manager assisted the traders with pricing mortgage bonds requiring a strong understanding of Mortgage banking, data analytics, and internal databases.

- Identified Cash Window was taking in loans with an original term of 25 years with a shorter duration in turn attaining a higher price, profiting \$50K per month.
- Monitor \$800 million in UPB of Adjustable Rate Mortgage depicting how loans should be securitized. Increased company's profit by \$1 million per year.

Freddie Mac  
McLean, VA  
*Mortgage Bond Analyst*  
(June. 2012 – April 2014)

As an Analyst and a Junior Analyst with Cash Pooling Analytics & Security Allocation I helped bundle mortgages into Mortgage Back Securities and settle the transaction in the Middle Office Trade support group.

- Structure \$35 billion in 30 year and 15 year Agency Securities based off market stipulations, price differentials in specified mortgages and understanding of prepayment risk.
- Presented with Above and Beyond Award for service delivery excellence for re-engineering the note rate to coupon slotting rules, improving best execution opportunities in Quantitative Risk Management software.
- Created the Caley Asset Pooling Engine (CAPE) that decreased 50 hours per month and changed the standards in securitizing mortgage loans by leveraging decision analytics, Visual Basics, SQL, and advanced excel formulas.

## EDUCATION

Arizona State University  
Tempe, AZ  
(Graduated May 2012)

Bachelors of Science

- Major: Finance

## CERTIFICATIONS / SKILLS

- Structured Query Language (SQL); R; Python; Excel; Pivot Tables Excel; Advanced Excel Formulas; VBA; Tableau; Visio; Microsoft Word; PowerPoint; Accredited Mortgage Professional Certificate (AMP); International Business Certificate; Bloomberg; Financial Analysis; Portfolio Management; Business and Financial Modeling Certificate; Financial Portfolio Modeling; Financial Risk; Mortgage Back Securities; Secondary Mortgage Market; Quantitative Risk Management; Data Visualization; Operations;