

# Don Lim

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Financial systems analyst with a proven record in financial systems, business analytics, and process automation. Experienced in IBM TM1/Planning Analytics, Salesforce CRM, SQL, and Python. Skilled at improving forecasting accuracy, financial reporting, and cross-departmental workflows through data-driven solutions. Transitioned from IT to finance to bridge technology and business operations. Pursued a Ph.D. at Texas Tech University before earning a terminal master's degree, uniting academic research and technical proficiency in econometrics and optimization

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## WORK EXPERIENCE

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### Green Brick Partners, Inc.

Plano, TX

Nov 2024 — Oct 2025

#### Senior Financial Systems Analyst, Finance and Operations

- Developed IBM TM1/Planning Analytics TI processes and business rules for financial planning and analysis, integrating first- and third-party tools (PAW, Excel, FileZilla, Cognos Command Center, Arc, Pulse, TM1py, Git) to enable daily forecasting cycles in place of biannual forecasts
- Programmatically built and maintained Planning Analytics OLAP database with 42 cubes, 88 dimensions, attributes, subsets, control objects, security, applications, and views across TM1 development, UAT, and production environments using a combination of MDX, SQL (joins, CTEs, cross applies), TurboIntegrator (TI), and TM1 rules
- Worked closely with VP of Asset Management and developed a land cash flow module incorporating uniform, annual, and quarterly cost-to-complete spreads, retainage, and payout schedules—reducing forecast preparation time by 50%
- Converted the mortgage forecast model from Excel to TM1, increasing calculation speed, granularity from business unit to project level, and integrating personnel and headcount assumptions, worked closely with the company controller; assumptions included home closings, loans funded, application and contract rates, loan expenses and fees
- Designed dynamic, auto-refreshing dashboards and visualizations for financial managers, the CFO, and board members, replacing SSRS reports and significantly reducing board package preparation time by 75%
- Spearheaded newly implemented Git repository to manage and restore backups for processes and rules. In addition, prepared quarterly internal audit reports on change tracking and change management to support SOX and ITGC audit compliance using Git Bash scripts
- Troubleshoot and fixed existing Excel forecast templates, using pivot tables, VLOOKUP/XLOOKUP, dynamic array functions, nested functions, and Power Query
- Designed and automated ETL workflows to process P&L, SGM, GL, KPI, statistical, and budget data, improving accuracy and efficiency in cash flow, KPI, and milestone forecasting for financial reporting
- Oversaw Workiva and land proforma integrations with Planning Analytics, including configuring APIs and table mappings
- Developed proof of concept exporting TM1 views to Power BI dashboards using Python (TM1py), REST API, and DAX
- Maintained change logs and documentation for all TM1 processes, rules, and applications

### Sales and Marketing Analyst, IT

May 2023 — Nov 2024

- Implemented and tested Salesforce development, UAT, and production environments, including training for 200+ end users (Salesforce CRM, Marketing Cloud, Sales Cloud, Data Loader)
- Created Salesforce weekly, quarterly, and ad hoc reports, dashboards, email templates, workflows, cadences, and flows for sales and marketing end users and management
- Cleaned, validated, deduplicated, and updated Salesforce data using a combination of regex, SOQL, Postman, Data Loader, and Workbench
- System admin for ERP and business applications (Constellation NEWSTAR Sales & Enterprise, BuildPro, Callendly, DocuSign)

### DocuNav Solutions

Frisco, TX

Jun 2022 — May 2023

#### Support Engineer

- Troubleshoot, built, and tested Laserfiche application suite for document lifecycle management, including Quick Fields, Workflow, and Form processes, which OCR, extract, route, classify, retain, and secure documents for clients in legal, corporate, and independent school districts
- Maintained non-clustered SQL servers (stored procedures, task scheduler, SSL certs, TLS config)
- Configured folder-, document-, and user-level security using admin consoles and Active Directory (AD)
- Administered internal IT support (workstation setups; printer, laptop, and peripherals troubleshooting)

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## EDUCATION

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### Texas Tech University, Department of Agricultural and Applied Economics

Lubbock, Texas

Master of Science in Agricultural and Applied Economics, GPA: 3.6/4

May 2022

- Relevant coursework: Causal Inference, Economic Optimization and Machine Learning, Applied Econometrics I & II, Advanced Production Economics, Mathematical Economics, Advanced Market Analysis, Applied Macroeconomics, Applied Microeconomics I & II
  - R (tidyverse), Stata, MATLAB, Python, SAS, L<sup>A</sup>T<sub>E</sub>X

- OLS, IV, TWFE, DiD, 2SDiD, RDD, matching (propensity score, kernel, entropy, Mahalanobis distance, KNN), synthetic control, event study, factor and cluster analysis, logit/probit, segmentation

#### **CEVRO Institute, School of Political Studies**

*Master of Arts in Political Science, Philosophy, and Economics (PPE)*

Prague, Czech Republic

Jun 2019

- **Scholarship:** Full Tuition for Excellence

#### **University of Michigan, College of Literature, Science, and the Arts**

*Bachelor of Arts in General Studies (Political Science, Philosophy, and History)*

Ann Arbor, MI

Apr 2016

### **RESEARCH EXPERIENCE**

#### **Free Market Institute, Texas Tech University**

*Economic Research Assistant*

Lubbock, TX

Aug 2020 — May 2022

- Investigated relevant literature for, revised, and edited book chapters and journal articles

#### **American Institute for Economic Research**

*EC Harwood Visiting Research Fellow*

Great Barrington, MA

Dec 2018 — May 2019

#### **Free Market Institute, Texas Tech University**

*Visiting Research Scholar*

Lubbock, TX

Sep 2018 — Dec 2018

- Researched and presented master's thesis: economic analysis of open-source communities

#### **Commonwealth Foundation**

*Research Fellow*

King of Prussia, PA

Jan 2017 — May 2017

- Created graphical visualizations of Pennsylvania's yearly expenditures and tax policies

- Wrote and edited two weekly publications regarding Pennsylvania's budget and education policy

- Responded to daily email inquiries regarding subsidies, right-to-work laws, and the state budget

#### **Cato Institute**

*Intern Researcher at the Center for Educational Freedom*

Washington, DC

Sep 2016 — Dec 2016

- Compiled and examined TIMSS and PISA datasets related to national education policy

- Summarized Capitol Hill proceedings regarding foreign affairs, trade, monetary, and education

- Produced over 200 Twitter/X posts on @HumanProgress

### **CERTIFICATIONS AND EXAMS**

- PostgreSQL for Everybody Specialization
  - PostgreSQL, DBeaver, NoSQL, Elasticsearch
- Web Applications for Everybody Specialization
  - MySQL, PHP, JavaScript, jQuery, JSON, XAMPP
- Applied Data Science with Python Specialization
  - Python (regex, NumPy, Pandas, scikit-learn, Matplotlib, Seaborn, NLTK, NetworkX), gradient descent, random forest, decision tree, SVC, linear and logistic regression, Lasso, KNN, Naïve Bayes, clustering
- Django for Everybody Specialization
  - Django, SQLite3, HTML5, CSS, JavaScript, Bash
- Passed Probability exam
- Laserfiche Gold & Platinum

Coursera, May 2024

Coursera, Oct 2023

Coursera, Aug 2023

Coursera, Jul 2023

Society of Actuaries, May 2023

Laserfiche, Oct 2022