Don Lim lim.don93@gmail.com | (806) 317-7937 | https://donlim93.github.io | https://www.linkedin.com/in/lim-don

Financial systems analyst specializing in financial systems, business analytics, and process automation. Experienced in IBM TM1/Planning Analytics, Salesforce CRM, SQL, and Python. Proven ability to enhance forecasting accuracy, streamline reporting, and optimize cross-department workflows. Transitioned from IT to finance to bridge business and technology. Earned a terminal master's degree at Texas Tech University, integrating econometrics and optimization to drive data-driven decision-making.

———————————————————————— WORK EXPERIENCE ————————————————————————

Green Brick Partners, Inc. Plano, TX
Senior Financial Systems Analyst, Finance and Operations *Nov 2024 — Oct 2025*

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- 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
- Troubleshot 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 =======
- Built and automated IBM TM1/Planning Analytics TI processes and business rules, integrating first- and third-party tools (PAW, Excel, FileZilla, Cognos Command Center, Arc, Pulse, TM1py, Git), enabling daily forecasting instead of biannual cycles.
- Programmatically maintained Planning Analytics OLAP database with 42 cubes, 88 dimensions, and supporting control objects, using MDX, SQL, TurboIntegrator (TI), and TM1 rules across dev, UAT, and production.
- Developed a land cash flow module with cost-to-complete spreads and payout schedules, cutting forecast preparation time by 50%.
- Converted mortgage forecasting from Excel to Planning Analytics, improving calculation speed, granularity, and data integration; collaborated with the Controller to enhance accuracy of loan and headcount assumptions.
- Designed automated, interactive dashboards for financial managers and executives, replacing SSRS reports and reducing board package prep time by 75%.
- Implemented and managed Git repository for TM1 processes, maintaining version control and SOX/ITGC compliance through automated audit scripts.
- Optimized Excel-based forecasting templates using Power Query, dynamic arrays, and nested functions to resolve calculation and refresh errors.
- Automated ETL pipelines for P&L, SGM, GL, KPI, and budget data, improving data accuracy and reducing manual processing.
- Oversaw Workiva and Land Proforma integrations with TM1, configuring APIs and database mappings.
- Built proof of concept for TM1-to-Power BI export via Python (TM1py), REST API, and DAX for dynamic visualizations.
- Documented all Planning Analytics processes, rules, and applications to support governance and team onboarding. >>>>>> d6ba1669fa6955ce509213ef9f4cfee9b8de2952

Sales and Marketing Analyst, IT *May 2023 — Nov 2024*
- Administered Salesforce CRM, Marketing Cloud, and Sales Cloud environments; implemented and tested enhancements across dev, UAT, and production.
- Created Salesforce dashboards, reports, workflows, and automated campaigns, improving visibility for 200+ end users.
- Cleaned, validated, and deduplicated Salesforce data using regex, SOQL, and Data Loader, increasing data accuracy.
- Served as system administrator for ERP and business tools (Constellation NEWSTAR, BuildPro, Calendly, DocuSign).

DocuNav Solutions Frisco, TX
Support Engineer *Jun 2022 — May 2023*
- Built, tested, and deployed Laserfiche document management solutions (Quick Fields, Workflow, Forms) that automated

document OCR, extraction, routing, and classification for corporate, legal, and school district clients.
- Maintained non-clustered SQL servers (stored procedures, task scheduling, SSL/TLS configuration).
- Managed document- and user-level security via Active Directory and admin consoles.
- Provided IT support for workstations, laptops, and peripheral devices.

EDUCATION

Texas Tech University, Department of Agricultural and Applied Economics   Lubbock, TX
Master of Science in Agricultural and Applied Economics, GPA: 3.6/4.0   *May 2022*
- Relevant coursework: Causal Inference, Optimization, Econometrics I & II, Production Economics, Machine Learning, Macro/Microeconomics.
- Tools and methods: R (tidyverse), Stata, MATLAB, Python, SAS, LaTeX; econometric methods including OLS, IV, DiD, RDD, matching, and clustering.

CEVRO Institute, School of Political Studies   Prague, Czech Republic
M.A. in Political Science, Philosophy, and Economics (PPE)   *Jun 2019*
Scholarship: Full Tuition for Academic Excellence

University of Michigan, College of Literature, Science, and the Arts   Ann Arbor, MI
Bachelor of Arts in General Studies (Political Science, Philosophy, and History)   *Apr 2016*

RESEARCH EXPERIENCE

Free Market Institute, Texas Tech University   Lubbock, TX
Economic Research Assistant   *Aug 2020 — May 2022*
- Conducted economic literature reviews and statistical analyses for academic publications and book chapters.

American Institute for Economic Research   Great Barrington, MA
E.C. Harwood Visiting Research Fellow   *Dec 2018 — May 2019*

Free Market Institute, Texas Tech University   Lubbock, TX
Visiting Research Scholar   *Sep 2018 — Dec 2018*
- Researched and presented master's thesis on the economic organization of open-source communities.

Commonwealth Foundation   King of Prussia, PA
Research Fellow   *Jan 2017 — May 2017*
- Designed visual reports of Pennsylvania's tax and expenditure data to support policy publications.
- Authored and edited weekly newsletters on state budget and education reform.
- Responded to legislative and public inquiries on fiscal and labor policy.

Cato Institute   Washington, DC
Research Intern, Center for Educational Freedom   *Sep 2016 — Dec 2016*
- Analyzed international education datasets (TIMSS, PISA) to evaluate policy impacts.
- Summarized congressional proceedings on education, trade, and monetary policy.
- Produced 200+ social media data visualizations for @HumanProgress.

CERTIFICATIONS AND EXAMS

- PostgreSQL for Everybody Specialization   Coursera, *May 2024*
  Skills: PostgreSQL, DBeaver, NoSQL, Elasticsearch
- Web Applications for Everybody Specialization   Coursera, *Oct 2023*
  Skills: MySQL, PHP, JavaScript, jQuery, JSON, XAMPP
- Applied Data Science with Python Specialization   Coursera, *Aug 2023*
  Skills: Python (regex, Pandas, scikit-learn), ML algorithms (random forest, SVC, logistic regression, KNN, Naïve Bayes, clustering)
- Django for Everybody Specialization   Coursera, *Jul 2023*
  Skills: Django, SQLite, HTML5, CSS, JavaScript, Bash
- Probability Exam (SOA)   Society of Actuaries, *May 2023*
- Laserfiche Gold & Platinum Certifications   Laserfiche, *Oct 2022*