**Robert Belttari**

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**Current Location:** Matthews, NC

**Work Status:** US Citizen

**Date Available for Interview:** Need 24 hours prior notice

**Date Available to Start:** Immediately

**Professional Qualification:**

* Skilled professional with hands on experience in relational database development, financial & operational data/statistical analysis risk management, and financial forecasting services to clients.
* Hands on experience in data quality, data profiling, and data governance to insure that decisions are made from correct information.
* Hands on Power BI and Tableau tools for dashboarding and visualizations.
* Skilled in designing SQL-based reporting tools to handle these tasks, added Agile Sprint functionality, for faster resulted in completion of critical data governance projects.
* Expert in providing automation for the related tools that were developed to increase accuracy and timeliness.
* The focus of the work is increasing operational efficiency, improving operational reporting, projecting financial results, and targeting prospects.
* The end results of these projects include reduced costs in client operations, improved compliance, and increased overall profitability.
* Clients benefiting from these services come from industries that include financial services, telecommunications, Internet services, health care, printing, and publishing, manufacturing, and data services.

**Technical Skills:**

**Programming Languages:** Transact SQL, Visual Basic/VBA, DAX, M Code, SAS, SPSS, HTML, Python

**Databases:** SQL Server, SQL Query, MS Access, Oracle PL SQL, Teradata, SharePoint, MS Excel, MS Excel Pivot Tables

**Database Tools:** MS Excel VBA, SSIS, SRS, Tableau, Power Apps, Power Automate, Power BI, JIRA/JQL, Alteryx, XML, Dataverse, Confluence, Agile development

**Spreadsheets:** Excel, Excel Pivot Tables, Excel VBA, Power Query

**Analytical and Development Processes:** Predictive Modeling/Logistic Regression, Customer Analytics, Decision Tree, Data Visualization, ETL (Extract, Transform, Load), Key Performance Indicators (KPI), interactive dashboards

**Education:**

* Master of Business Administration with a concentration in Finance; Wayne State University
* Bachelor of Arts in Advertising; Michigan State University

**Professional Experience:**

**Bank of America (Iconma) Charlotte, NC**

**DevOps Engineer**

**Data Analyst May 2025 - Aug 2025**

* Developed data lineage and documentation system for a system of over 300 Tableau reports
* Consulted with subject matter experts to develop the system.
* Integrated the data lineage and documentation system with the teams reporting hub.

**Technology:** Alteryx, Tableau, and MS Excel/VBA for presenting results. Oracle and Teradata for data connectivity and enhanced reporting functionality.

**Wells Fargo (The Judge Group) Charlotte, NC**

**Lead Software Engineer/Data Analyst Feb 2024 – Feb 2025**

* Worked on data governance software systems to capture enterprise application data, request certifications from relevant stakeholders, and report on certification status. An additional system was required to capture and report on enterprise application lifecycle data. A large amount of automation was needed.
* Worked on Power BI to create dashboards and visualizations for various client project deliveries.
* Designed and built Power Apps applications to facilitate stakeholder data gathering.
* Designed and built Power BI applications with drill down and drill through capabilities to track and report certification and application lifecycle detail in real time.
* Worked directly with the business operations managers to design systems to make this happen.
* Designed and built Power Automate data flows to automatically (at specified dates and times) move data, populate relevant data tables, solicit certifications, and clean data.

**Technology:** MS SharePoint, MS Power Apps, MS Power Automate, Power BI, Power Query, Dataverse, Tableau, Jira, Visio, and MS Excel.

**Wells Fargo Charlotte, NC**

**Senior Execution Consultant/Data Analyst Aug 2022 – Mar 2023**

* Migrated a large document storage network from SharePoint 2013 to SharePoint Online (cloud storage) and network storage.
* Took charge of doing the profiling of data from the old system to determine the migration needs for the Enterprise Data Governance group.
* This involved SQL coding to profile the universe of files to be addressed.
* Designed SQL-based reporting tools to handle these tasks, added Agile Sprint functionality, this resulted in faster completion of critical data governance projects and better prioritization of work.
* Worked with end users and information system group to determine mapping parameters in the new cloud storage system. An efficient transfer of necessary files resulted.
* Built out applications using SharePoint Online storage with Power Apps and Power Automated, to automate document reviews and approvals.
* Worked on database reporting system to organize users/projects/project details for reports and automated notifications within the Data Governance group
* Risk management relative to data assets was the focus and this was a priority of my business analysis work.

**Technology:** SQL, MS SharePoint, MS Power Apps, MS Power Automate, Power BI, Power Apps, Jira/JQL, MS Access, MS Excel, Pivot Tables, Data Lake, Python

**Wells Fargo (Apex Systems) Charlotte, NC**

**Senior Data Consultant Jul 2020 – Aug 2022**

* Worked on multiple databases to catalog a large volume of bank policy documents and track industry concerns that were being covered and which were not.
* Set up requirements gathering for the databases and then built two databases (front and back ends for each) with Microsoft Access (using SQL and VBA).
* The reporting and SQL querying capabilities that I built can answer a multitude of management questions. The architecture that I set up maximizes response time and has a backend that is scalable to an enterprise grade database system.
* Have turned unorganized data into actionable information.
* The database was structured to cover matters that were pertinent to regulator risk.

**Technology:** MS SharePoint, MS Power Apps, MS Power Automate, Power BI, Jira, MS Access, and MS Excel.

**Wells Fargo (Dexian) Charlotte, NC**

**Senior Data Consultant Sep 2019 – Feb 2020**

* Worked on data lineage (the history and path of data moving through the organization), profiling of data fields, and quality control to be performed to ensure new reporting data systems were providing accurate data for regulatory reporting systems.
* Queried data across multiple Oracle and Teradata data systems with SQL for data profiling work.
* Participated in meeting each objective; in terms of reporting and remediation efforts on transformed data fields.
* Found anomalies between systems and worked with upstream parties to understand and eliminate differences in data with necessary manual modifications.
* Defect resolution reports and plans were created by me to ensure data quality work was fully carried out.
* Data transformation quality, between systems, was verified by me.

**Technology:** Excel, Oracle PL SQL, and Teradata SQL were used for data summarization. Reporting: FR Y9C

**Bank of America (NTT Data) Charlotte, NC**

**Data Analyst Jan 2018 – Sep 2019**

* Worked on data profiling and lineage (the history and path of data moving through the organization) to be performed to ensure new data systems were providing the same information as aging data systems for regulatory reporting.
* Pulled together documentation, service level agreements, and metadata information to determine what necessary testing had to be done for the data system transition.
* Validated that the documentation was being followed by querying the relevant Oracle and Teradata databases with SQL and compared results from the different databases and delivered the results to management in Excel and PowerPoint.
* Created a template for data sharing agreements between a reporting system and data providers.

**Technology:** Colibra, Excel, Access, SQL Server, Oracle PL SQL, and Teradata. Reporting: FR Y9C and 14Q

**Wells Fargo (NTT Data) Charlotte, NC**

**Data Analyst Apr 2017 – Dec 2017**

* Wells Fargo, needed to gain an understanding of software products deployed across all servers, desktop, and laptop computer assets.
* Built new Excel-based & Tableau-based reporting so the status of software products on the banks computers could be better understood by senior management and resolutions could be made by IT managers.
* Dashboards and visualizations were created with Tableau.
* They needed to know which software products installed were not evaluated, not supported, permitted/not permitted, or obsolete.
* Developed reporting and identified needed remediation to meet these objectives.
* Using data from a software discovery tool that scanned all of the banks servers and personal computers, and internal documentation databases of permitted software.
* Helped map relevant data systems for this reporting and implement new systems.

**Technology:** SQL Server for data aggregation and analysis. SQL Server Reporting Services (SSRS), MS Excel and Tableau for presenting results.

**Bank of America (NTT Data) Charlotte, NC**

**Data Analyst Oct 2015 – Mar 2017**

**May 2025 – Present**

* Needed reporting systems built to present mortgage sub servicing results.
* Served as the lead consultant over three other consultants, developing reporting and presenting results.
* The group created and ran analysis in SQL Server and Excel/VBA to quickly aggregate data from servicers and provide detailed Excel tables and PowerPoint graphic/ heatmap results of the testing results to management.
* The testing operation was run in a very fast paced manner.
* Reporting requirements were in constant flux. The team managed to successfully adapt their reporting system to monthly changes in tests, scope, and testing methods and provide reporting on time each month.

**Technology:** MS Access, SQL Server for data aggregation and analysis. MS Access, MS Excel/VBA and Tableau for presenting results. SQL Server, VBA (Access) for data connectivity and enhanced reporting functionality.

**Bank of America (Meridian) Charlotte, NC**

**Database Developer/Data Analyst May 2015 – Oct 2015**

* Needed to enhance data quality control measures to comply with new banking regulatory requirements. New procedures, reporting, and documentation needed to be developed.
* Analyzed written requirements and develop procedures to handle the requirements. This included hosting recurring discussions with up-stream data providers and downstream data users.
* Examined existing data quality measures and those that were being constructed.
* Comparing the two, as well as directly querying the relevant data systems, searched for gaps and duplications.
* Worked with quality control architects to cover gaps and eliminate duplications.

**Technology:** MS Access and SQL Server for data aggregation and analysis. MS Access, and MS Excel for presenting results. SQL Server, VBA (Access) for data connectivity and enhanced reporting functionality.

**Wells Fargo (Dexian) Charlotte, NC**

**Data Analytics Consultant Mar 2014 – May 2015**

* Worked on the tactical information systems to be developed in short order, using local data and enterprise data sources, to better understand operational activity for derivatives trading.
* This includes moving Excel solutions to Access, and Access solutions to SQL Server.
* Gathered requirements, designed & developed databases, facilitated testing, documented, and implemented interactive databases that pulled together the necessary data and outputs for securities operations reporting.
* The systems I created greatly reduced the users’ time to gather necessary information, compared with previous reporting solutions.
* These systems have user-friendly graphical user interfaces. Client/Server and web architectures were frequently used for data storage and retrieval.
* Successfully worked in a development team environment.
* Synergies were achieved with other team members that increased the quality of all data system projects and the speed of deployment of those systems.
* Was also successful in working with other partner groups that were in front office, middle office, and technology areas for the initial and final stages of the database design/development/implementation cycle.
* Modified reporting solutions to run on larger and more stable platforms, as well as working with another team that was engaged in this activity.

**Technology:** MS Access, SharePoint, SQL Server and SSIS for data aggregation. MS Access, SSRS, and MS Excel for presenting results. VBA (Access) for data connectivity and enhanced reporting functionality. The Wells Fargo enterprise data systems that I used include: Broad ridge, Colibra, Calypso, FACS, and FIST/MATS.

**Bank of America (Meridian) Charlotte, NC**

**Database Developer/Data Analyst Jun 2012 – Mar 2014**

* Needed a database system to quickly aggregate the monthly reconciliation of trading system financial data and market risk management data.
* Involved all global markets and all security types. Compliance with new financial regulations was a primary objective, as was increasing the speed of reconciliations.
* Gathered requirements, designed & developed databases, facilitated testing, documented, and implemented several databases that systematically assembled the necessary inputs, and displayed the aggregated data in a user-friendly assortment of views through user-friendly interfaces which allowed the user many ways of drilling down into trading and middle office data.
* Also performed in-depth investigations/data mining into financial and risk data with the tools I created.

**Technology:** MS Access and SQL Server for data aggregation. MS Access, and MS Excel for presenting results. SQL Server, VBA (Access) for data connectivity and enhanced reporting functionality.

**T. Rowe Price (McKinley)**

**Data Scientist/Data Consultant Sep 2006 – Dec 2018**

* Needed a more effective technique to prioritize retail leads to increase mutual fund sales and profitability.
* Gathered requirements, designed databases, transformed data, developed databases, facilitated testing, documented, and implemented data systems for regular quarterly reporting, and ad hoc reporting.
* The purpose of this was to analyze the effectiveness of multiple sales channels, using new scoring schemes and previous selection techniques. Average new investor investment amounts increased significantly.
* The reporting led to the expansion of cost effective sales channels and the contraction/elimination of cost ineffective sales channels, using marketing analytics.
* Created new multivariate scoring schemes for predicting/targeting large opportunity investors using marketing call center, marketing database, and third party household level data.
* Explanatory Tree maps were created to explain the most important drivers of current and past large new customer investments.
* Task on this project, I put together a methodology and prototype system for monitoring promotion code responses and sales.

**Technology:** SPSS and MS Access for data manipulation. SPSS for logistic regression and CHAID tree modeling. VBA (Access) for enhanced reporting functionality, SPSS and Excel for reporting.

**PACCOM (Belttari Information) Charlotte, NC**

**Data Consultant Jun 2012 – Mar 2014**

* Worked with the organization to create a multivariate modeling scheme that defined the segments that provided a map of who their best clients were in terms of total revenue.
* Another modeling scheme was built that defined the segments that provided the end client with sales growth.
* Specifically, CHAID is being used to explain the most lucrative segments in the clients marketing database.
* The end client is incorporating the segmentation results into future service offerings.

**Technology:** SAS, SPSS and MS Access for data manipulation. SPSS for CHAID tree modeling.