

# Jacob Swe

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## Experience

### Polen Capital

New York, NY

#### AI Architect & Lead Data Scientist

Jul 2024 – Present

- Implemented custom frontend for LLM inference, growing to >150 users (75% of firm) and 60M tokens monthly
- Oversee all GenAI infrastructure and inference as well as all classical training and deployment on Kubernetes
- Develop agentic workflows including multi-tool and multi-agent frameworks for complex analysis and Q&A
- Write and deliver onboarding and training on AI to more than 200 attendees with high conversion to active user

#### Lead Data Scientist

Oct 2023 – Jul 2024

- Created strategic plan for enabling safe and cost-efficient LLM use for the firm, saving \$100k over vendors
- Released framework and UI for user-customized agents with custom vector databases, tool use, and moderation
- Integrated natural language APIs for 25+ endpoints to enable chat-based access to the most important firm data

#### Senior Data Scientist

Dec 2021 – Oct 2023

- Lead the development of quantitative research Python package with 5 developers still used by all PM teams
- Stood up complex performance and risk platform with automated deployment from 3k+ monthly reports
- Orchestrated ongoing optimizations of investment idea generation frameworks using differential evolution

#### Data Scientist

Jul 2021 – Dec 2021

- Established a new data science practice, including architecture, training, deployment, and inference on Azure
- Worked with Portfolio Manager and Distribution teams to create and present 3+ client facing whitepapers
- Responsible for ongoing portfolio monitoring and PM idea analysis covering 8+ strategies across the firm

#### Data Analyst

Aug 2019 – July 2021

- Conducted >20 complex research projects based on client inquiries and research team hypotheses
- Supported ongoing portfolio analysis through onboarding to performance and risk monitoring practices

#### Summer Associate

Jun 2018 – Aug 2018

- Developed proof-of-concept attribution reporting system with end-to-end ETL, Data Engineering, and dashboards

### Ascent Conference

New York, NY

#### Intern

May 2017 – Apr 2019

- Supported venture capital investing conference with general analytics, sales development, and research
- Generated and automated pitch deck creation for 90+ companies before each conference

### NYU Stern – Management & Organizations

New York, NY

#### Research Assistant, Under Prof. Hegde

Feb 2016 – Apr 2017

- Systemically reviewed academic literature of similar studies of insider trading on FDA drug decisions
- Recreated old study of long-term funding trends in government creating previously unknown insights

## Education

### New York University – Stern School of Business

New York, NY

Bachelor of Science – Statistics, Computing & Data Science. Minor – Mathematics. 3.8/4.0

May 2019

Honors: Cum Laude, University Honors Scholar, Dean's List, D3 Diving Team Member

## Volunteering

### NYU Business Analytics Club

New York, NY

#### Mentor and Advisor

Aug 2019 – Present

- Offer professional mentorship to a class of freshman students each semester on career and academic direction
- Occasionally offer technical advice to teams of students conducting data science projects for startups

## Skills & Interests

**Development:** Python, Pytest, SQL, Azure Functions

**GenAI:** OpenAI, Anthropic, LangChain, LangGraph

**Data Science:** AzureML, SKLearn, PyTorch, BERTopic

**Computing:** Kubernetes, Docker, Jupyter, Linux

**Data:** Pandas, Numpy, SQLAlchemy, Pydantic

**Visualization:** Seaborn, Matplotlib, Plotly

**Azure:** Azure Functions, Logic Apps, DevOps, Artifacts, Webapps, AI Studio, Azure Pipelines, VMs, Bicep

**Topic Modeling:** End to end topic modeling using BERTopic to dynamically index risk based on queries

**Agent Development:** Graph based multi-tool and multi-agent development for complex workflows and Q&A