

J WHITE

DATA ANALYST

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Certified Data Analyst and Operations Specialist for LPL Financial with a passion for developing data-driven narratives and complex insights in the world of data. Building upon a background in customer service and theatre studies, the transition into working with data utilizes the creative and critical thinking from the world of theatre, and the knowledge of how to understand and address the needs of people from many different positions and backgrounds.

WORK EXPERIENCE

Sr. Financial Data Analyst & Operations Specialist

03/2023 – Present

LPL Financial

- Conducts audits of cost basis functions and statements, tax forms, and system elevations to ensure accurate information. Any discrepancies are promptly reported to management for investigation and resolution, resulting in flawless execution.
- Manages daily quality control and error rates, conducts exception review processing, and delivers daily reporting metrics.
- Consistently liaises with operational groups to resolve account discrepancies in fast-paced environments.
- Maintains and updates cost basis tax lots, analyzing and reviewing any changes related to transactional adjustments, corporate action activity, and relevant systems and processes.
- Serves as a knowledgeable resource in the department, able to apply complex Cost Basis and Tax Reporting process knowledge to inquiries received.

Financial Data Analyst & Operations Specialist

11/2022 – 03/2023

LPL Financial

- Reviewed, analyzed, maintained and updated cost basis tax lots for changes due to transactional adjustments, corporate action activity, and related systems and processes.
- Audited cost basis functions and performs audits of statements, tax forms, and system elevations to ensure information accuracy, elevating any inconsistencies to management for investigation and resolution in order to achieve flawless execution.
- Performed daily quality control, manage error rates, perform exception review processing and provide daily reporting metrics.
- Communicated with advisors and other operational groups to resolve various account discrepancies and relays policy related information consistently in fast paced situations.
- Acted as a resource to the department and able to apply complex knowledge of the overall Cost Basis and Tax Reporting processes for inquiries received from internal and external customers and vendors.
- Audited cost basis functions and performs audits of statements, tax forms, and system elevations to ensure information accuracy, elevating any inconsistencies to management for investigation and resolution.

Freelance Data Analyst

07/2021 – 11/2022

Self Employed

- Efficiently conveyed business insights by employing data visualization tools on a dataset exceeding 200 data points.
- Analyzed and interpreted intricate trends and patterns from a complex dataset containing over 71,000 rows by designing SQL tables and views.
- Dedicated approximately 20 hours per week towards attending numerous requirements meetings, identifying effective techniques to extract and streamline data sources based on business needs.

Lead Manufacturing Operator

02/2015 – 06/2021

MirrorMate, LLC

- Managed frame manufacturing production in a warehouse environment, prioritizing quality control by ensuring precise measurements, accuracy in frame style, and zero defects.
- Acquired comprehensive knowledge of equipment issues, maintenance, and calibration, becoming the go-to expert for troubleshooting.
- Actively engaged in bettering processes by generating suggestions, collaborating with colleagues on problem-solving, utilizing critical thinking skills to analyze problems, and making informed decisions.
- Instrumental in driving production growth, with an increase of roughly 60%, from a daily output of approximately 125 frames to consistently exceeding 200 frames per day.

EDUCATION

Bachelor of Arts

Theatre Studies | University of North Carolina at Charlotte

Certification

2020 – 2021

Data Visualization and Analytics | University of North Carolina at Charlotte

SKILLS

TECHNICAL SKILLS

Financial Data Analysis | Data Quality Control | Data Extraction | Data Cleaning | Data Visualization

Python | Microsoft Excel | VBA | HTML | JavaScript | SQL | Tableau | AWS

SOFT SKILLS

Communication Skills | Written Communication | Problem-Solving | Collaboration

Organization | Critical Thinking | Passion | Presentation Skills

PROJECTS

Geographical Map | [Link](#)

Luther Burbank Center for the Arts, CA

Goal of the Project:

- Create a geographic map which visualizes each program's location in the company's home state of California, as well as nationwide and around the world.

Responsibilities:

- The dataset acquired, which consists of over 200 locations within California and 100 locations worldwide, was imported into Jupyter Notebook further cleaning with Python and then visualization. For a more detailed CA map, a vector file was imported into Adobe Illustrator, ensuring that the points in the final product maintained accuracy.

Transformation of Data:

- The dataset was housed within MS Excel. The data was extracted, transformed, and loaded into Jupyter Notebook. A further prototype was assembled utilizing Folium and a vector map was constructed with Geopandas.

Languages and Technologies Used:

- Python, Pandas, Geopandas, Jupyter Notebook
- Folium, Contextily
- Google Geolocator API
- Matplotlib
- Adobe Illustrator