

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

Financial Data Analyst & Sr. Operations Specialist

11/2022 – Present

LPL Financial

- Audits 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.
- Performs daily quality control, manage error rates, perform exception review processing and provide daily reporting metrics.
- Communicates with operational groups to resolve various account discrepancies consistently in fast paced situations.
- Reviews, analyzes, maintains and updates cost basis tax lots for changes due to transactional adjustments, corporate action activity, and related systems and processes.
- Acts as a resource to the department and able to apply complex knowledge of the overall Cost Basis and Tax Reporting processes for inquiries received.

Freelance Data Analyst

07/2021 – 11/2022

Self Employed

- Utilized data visualization tools to effectively communicate business insights with an acquired dataset of over 200 data points.
- Developed SQL tables and views, analyzing and interpreting trends or patterns with a complex dataset consisting of over 71,000 rows.
- Participated in several requirements meetings to understand business needs and documented effective methods for extracting and organizing data and data sources, requiring approximately 20 hours per week.

Lead Manufacturing Operator

02/2015 – 06/2021

MirrorMate, LLC

- Oversaw the production of frame manufacturing in a warehouse setting with a focus on quality control by personally maximizing accuracy in measurement, style, and defect.
- Became the go-to subject-matter expert for troubleshooting equipment issues, repairs, and calibration.
- Participated in continuous improvement by generating suggestions, engaging in problem-solving activities to support teamwork, and used critical thinking to break down problems, evaluate solutions, and make decisions.
- After joining the team, production increased about 60%, going from producing approximately 125 frames per day, to over 200 on a regular basis.

Customer Service and Sales Associate

08/2008 – 01/2016

Kohl's Department Store

- Engaged with customers to build rapport and loyalty. Solved customer challenges by offering relevant products and services.
- Maintained calm demeanor and professionally managed issues in busy, high-stress situations.
- Enhanced product presentation and promotional material displays, working alongside retail representatives.
- Accurately processed POS transactions, returning coin, currency, payment cards, and receipts to customers.

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

Data Analysis | 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

Carmen! Carmen!

Goal of the Project:

- Create a custom HTML dashboard that will provide a user-friendly, searchable method of accessing the remote database, giving the user the ability to search and modify the data, and then launch an automated test browser to search Instagram for the portfolio of the stylist selected.

Responsibilities:

- Acquiring the dataset of just under 72,000 stylists and their addresses located within North and South Carolina, the decision was made to sort the data by their geographical distance from the target salon, load that data remotely using Google BigQuery, and access it via the custom-made dashboard.

Transformation of Data:

- Uploaded the stylist dataset inside a Jupyter Notebook environment and narrowed the dataset down to those who are currently certified and are within a certain distance of the target salon.

Languages and Technologies Used:

- Python, SQL, Jupyter Notebook
- Flask, Jinja2
- Google Cloud, App Engine, BigQuery
- Bootstrap, HTML, CSS, JavaScript