J. Luke Williams

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Education

- Queens University of Charlotte, Charlotte, NC (Graduation Spring 2017)
- Bachelor of Finance with concentration in Investment Management (GPA 3.8)
- Membership in Charlotte Chapter of Beta Gamma Sigma Honor Society (AACSB)

Skills

- Excellent Computer Software, Nexus Chameleon SQL and Microsoft Excel Analytics (using VLookup and IF, Sum Product, Sum IF functions, Pivot Tables Logical Statements, Macros)
- Detailed understanding of capital markets with a developed understanding of the use of investment securities, such as stocks, bonds, options and futures
- Proficient computer literacy and communication skills (Microsoft Word, Excel, PowerPoint & Access
- Certified in HTML5, CSS3, Javascript, jQuery, Bootstrap, React.js, Node.js, C#, .Net, Database Theory, Bookshelf.js, MongoDB, MYSQL
- GitHub: https://github.com/jlukewilliams94

Work Experience

Vigil Inc. (vigilmobile.com)

Co Founder/ Head of Application Development and Innovation (November 2018 - Present)

- As the co-founder of Vigil, I developed and pitched a plan for an innovative and new technology solution that would revolutionize the stale dating/social application industry by bridging a connection between users and the businesses in their area.
- By conducting diligent research and identifying gaps in the this market I acquired 750k in capital investment from an angel investment group to launch Vigil Inc.
- As head of application development and innovation I am in constant contact with 3rd party vendors, stakeholders and the Vigil development team (10+ team members) to ensure, that while working in an Agile environment, the weekly, monthly and quarterly application development targets/goals are met.
- Work with application development executive team to evaluate and identify 3rd party API vendors. Perform in depth analysis to determine the 3rd party vendors risk, cost and return on investment.
- Drive and lead the Vigil executive team (legal, finance, development) to be diligent and to only partner with industry leaders that provide a superior product so that Vigil in turn stands out against its competitors.
- Actively strive to understand and learn about new and unique technology advancements in the social networking application industry to ensure Vigil is on the bleeding edge of technology implementation.
- Work directly with development team to build the Vigil UI/UX shell while learning and harnessing 3rd party API technologies to achieve the desired application solutions Vigil will be known for. Have hands on interaction with computer software development tools like react.js, node.js and other 3rd party SDKs,
- Strive to form a unique Vigil identity, mission and values in the market in the build up to MVP and Beta release in the summer of 2020 by building a creative marketing strategy to get users hooked on Vigil from day one of launch.

Member of Wells Fargo Bank N.A. Data Management Insight (DMI)

Data Management Consultant (2) for Trade Products Division (TPD) (July 2019 - Present)

- Work with constituencies and stakeholders across finance, risk, line of business, compliance, DMI, and technology subject matter experts to identify and document information business requirements.
- Analyze reporting, analytical requirements and identify critical path processes and dependencies on creating comprehensive solution.
- Identify and recommend internal and external data sources to meet business content requirements.
- Conduct complex data analysis and makes recommendations.
- Compile/mine data from multiple, cross business sources. Recommends and participates in the development of complex designs using statistical and/or financial analysis, predictive modeling, process documentation, comparative analysis, customer/demographic analysis, and other analytics.
- Interprets results and recommends solutions to increase revenue, reduce expense, and maximize operational efficiency/quality.
- Ensures adherence to data management and data governance policies.
- Analyze very large, structured and unstructured datasets from multiple sources. Assist technology partners and the business in the software development delivery cycle, use and adoption of query tools, reporting tools, business intelligence tools, and other analytic tools that enable analysis, modeling, and/or data visualization.
- Provide coaching or mentoring to other project teams and less experienced team members.
- Actively work with Nexus Chameleon SQL to perform logical testing of data used by various divisions within Wells Fargo Bank N.A and Wells Fargo Securities.

Member of Wells Fargo Securities FCM Operations group.

Capital Markets Analyst (III) with Derivative Clearing Services at Wells Fargo Securities (November 2018 - July 2019)

- Responsible for analyzing and ensuring all Exchange Fees and Commissions are collected and captured correctly on trades and downstream systems.
- Work with multiple stakeholders (Sales and Trading, Finance, Brokerage, Static Data Group, Technology, etc.) to identify commissions and fees discrepancies.
- Functions for this position include: Interact with Operations, Front Office Trading and Sales, Finance, and Clearing Brokers to resolve client commissions and fees issues.
- Accurately charge and collect commission for Futures and OTC Cleared trades for both Member and Non-Member relationships. Work directly with Electronic Give-Up System to initiate and execute Give-Up Agreements for both Clients and Firm Affiliates.

- Provide internal and external support across various projects. Review and generate various reports to management related to Fees and commission upon request.
- Work with client relations to update and create commission schedules for current and prospective clients
- Work with major exchanges (LCH, CME, EUREX) to allocated Interest Rate & Credit Default Swaps, Fixed Income Products, Futures and Options contracts.
- Create procedures for daily duties to increase our teams efficiency and help reduce overall errors.
- Handle and understand an array of securities across multiple exchanges and in different currencies
- Support focus on building strong customer relationships balanced with a strong risk mitigating and compliance-driven culture.
- Day to day use of Microsoft Excel & Access & GMI, CME & ICE Systems.

Junior Advisory Partner with Linden Thomas & Co. (Wells Fargo Advisors Financial Network) (June 2017 – March 2018)

- Responsible for bringing in 13 million dollars in client's assets through cold calling in 5 months.
- Recruited by Linden Thomas and Company, one of the nation's top 10 independent investment advisory firms as ranked by Barron's Financial Magazine, Forbes Magazine and Financial Times with over $1.4 billion in assets under management.
- Teamed up with Senior Partners to consult with high net worth and ultra-high net worth individuals and organizations to establish personal and business goals, net income needs and tax implications.
- Worked with CPA's and CFA's to establish a comprehensive and sustainable strategy to meet or exceed client's goals and expectations
- Served as a client liaison to ensure a positive client experience including periodical reviews and assisting client's needs. Demonstrated a mastery of CRM skills along with written and verbal communication skills to strengthen and build our client relations
- Proficient day to day use of Microsoft Access, Excel and SQL to manage prospective clients contact information (using using VLookup and IF, Sum Product, Sum IF functions, Pivot Tables, Logical Statements, Macros
- Worked under CEO to evaluate and individually buy bonds and derivatives for clients in order for their portfolio to maximize returns and provide a desired retirement income while managing their risk.