J. Luke Williams

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Education

- University of North Carolina – Charlotte, Software Engineer Coding Camp (Graduation 2020)
- Queens University of Charlotte, Charlotte, NC (Graduation Spring 2017)
- Bachelor of Finance with concentration in Investment Management (GPA 3.8)

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, futures and OTC derivatives.
- 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

Work Experience

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.
- Extensive knowledge of traded derivative, equity and fixed income securities.
- 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, Tableau, Microstrategy to perform logical UAT and PRD testing of data used by various divisions within Wells Fargo Bank N.A and Wells Fargo Securities.

(Aerotek Contractor) Wells Fargo Securities FCM Operations group.
Capital Markets Analyst (III) with Derivative Clearing Services at Wells Fargo Securities (September 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 team/ directly with clients to update and create commission schedules.
- 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 team's 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