**JOSEPH A. BREYMEIER JR., MBA**

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**Data Analyst**

Energetic and trusted Data Analyst proficient in financial processes and data science. Experience in all aspects of wealth management including investment portfolios, retirement accounts, and life insurance plans. Excellent ability to build solutions to improve workflow and optimize operational processes. Thrives in a collaborative team environment.

**KEY STRENGTHS**

Investment portfolio management Project management Process automation

Financial planning & analysis Client Relationships Collaborative approach

Data collection & analysis Operations efficiency Written & verbal communication

Financial modeling Workflow streamlining Attention to details

**PROFILE & CERTIFICATIONS**

**Software & Applications:** HTML, CSS, Python, SQL, Microsoft Office (Advanced Excel), Tableau

**Certifications:** Adult First Aid/CPR/AED Certified, 2021; Series 7 Certification, 2019; Life and Health Producer (NJ & PA), 2018

Professional Experience

**Senior Operations Business Analyst / Cenlar FSB, Customer Interaction Department /** *Ewing, NJ* / September 2020 – Present

+ Used >20 software applications to query data and depict trends in points of contact volume activity. Used the correlations between methods of communication to make significant improvements to the Customer Interaction Department.

+ Inherited and improved 74 dated processes which sped up reporting rate. Made reporting less redundant and introduced automated solutions to produce meaningful commentary related to weekly findings.

+ Executed >300 ad-hoc tasks/projects to answer complex questions from senior management regarding a variety of topics within the Customer Interaction Department.

**Operations Analyst / Janney Montgomery Scott LLC, Mutual Funds Operations Department /** *Philadelphia, PA* / July 2019 – January 2020

*Financial services firm offering asset management, financial planning, and consulting services*

+Led project to reimburse 739,000 clients for 25 years of erroneous mutual fund fees. Collaborated with IT to extract relevant data and designed automated tool that accurately calculated reimbursements with required granularity.

+ Analyzed fee structure of 3rd party software vendor and identified opportunity to save $1.9M annually. Created new monitoring tool enabling monthly, instead of yearly, evaluation of costs to identify future savings.

+ Transformed commission processing system; eliminated 1-3 month delays by creating automated platform which enabled access to real-time data, performed validations, and created alerts. Reduced processing time from 3 days to 10 minutes.

**Financial Analyst / MassMutual, Budgeting and Analysis Department /** *Lawrenceville, NJ* / May 2018 – July 2019

+ Advised clients and assisted senior advisor; analyzed client profiles, made suggestions for asset restructuring, created performance reports and presentations encompassing retirement plans and investments for 1,900 clients.

+ Managed end-to-end organization of >25 dinner seminars for clients & prospects, selected presentation topics, and developed pipeline; resulted in increased prospect participation and conversion rate.

**Financial Advising Intern / MassMutual, Sales Department /** *Iselin, NJ* / May 2017 – May 2018

+ Pioneered utilization of new CRM system and increased prospecting efficiency by populating CRM with biographical info of >10k clients and creating custom actionable alerts.

+ Prospected new clients through research and direct reach out, developed pipeline and prepared presentations.

+ Qualified & prioritized prospects based on proximity to sales seminar venue leading to higher attendance rate.

**EDUCATION**

**Rowan University, Rohrer College of Business /** *Glassboro, NJ* / 2018 - 2020

**Master in Business Administration (MBA)**

**Major: Finance**

**Fairleigh Dickinson University (FDU), Silberman College of Business /** *Madison, NJ* / 2014 – 2018

**Bachelor of Science (BSc)**

**Major: Finance**

**Minor: Wealth Management** (Personal Financial Management, Financial Markets & Institutions, Financial Analysis, Personal Tax Planning)

**LEADERSHIP AND COMMUNITY**

**Co-Founder of Investment Club / Fairleigh Dickinson University /** Oct 2015 – May 2018

+ Co-Founded and grew investment club from 4 to 18 members within 2 years. Won contest for paper-trading portfolio with top % return, results evaluated by Investopedia

**Co-ed Basketball Coach, Special Olympics, (11th Grade) /** *Lawrenceville, NJ* / May 2015 – August 2019

+ Teach plays and drills, foster warm environment and focus on developing relationships with players.

**NCAA Division III Student Athlete, Baseball Team / Fairleigh Dickinson University /** Aug 2014 – May 2018

+ Team captain 2017-2018; devoted 20 hours/week to conditioning, practices, and games. Led tours of facilities to prospective athletes and parents.