

Jonathan Garcia

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Professional Summary

Analytical and detail-oriented with a strong foundation in applied mathematics, data analysis, and financial operations. Skilled in leveraging statistical modeling, SQL, Power BI, Python, and Excel automation to deliver data-driven insights for risk assessment and financial forecasting. Experienced in data visualization and communicating complex analyses clearly to both technical and non-technical stakeholders. Bilingual in English and Spanish.

Examinations

- SOA Exam P – Probability – Passed [May, 2025]
- SOA Exam FM – Financial Mathematics – Passed [October, 2025]

Education

Bachelor of Science in Applied Mathematics

California State University, Fresno – Fresno, California

Graduation Date: [December, 2024]

Relevant Coursework: Probability & Statistics, Mathematical Modeling, Numerical Analysis

Technical Skills

Programming: Python, R, SQL, VBA

Data Tools: Power BI, Excel (advanced)

Statistical Modeling: Regression, Time Series, Predictive Modeling

Other: Financial Modeling, Data Cleaning, Forecasting

Professional Experience

Data Analyst – Candies Tolteca Co. | Fresno, CA

[December, 2024] – [Present]

- Built Power BI dashboards to visualize financial and operational data across sales and warehouse functions, enabling real-time monitoring of key routes and products.
- Conducted experience studies and analyzed account performance by region, identifying growth opportunities that drove a 5% increase in profit through optimized product allocation.
- Developed SQL and Excel-based models to track trends, forecast sales, and support strategic and operational planning.
- Automated data workflows using Excel VBA and Power Query, improving reporting

efficiency by 80%.

- Assisted in developing a Material Requirements Planning (MRP) program to optimize product inventory and production schedules.
- Partnered with Sales leadership and finance teams to design data-driven campaigns, interpret statistical results, and support business decisions.

Research Assistant - UChicago| Chicago, IL

[June, 2024] – [August, 2024]

- Contributed to an eight-week research project focused on enhancing financial transparency through automated document analysis.
- Applied natural language processing (NLP) techniques to fine-tune transformer models for text summarization of Form 8-K filings.
- Developed concise, information-rich summaries of complex legal documents, streamlining manual extraction of key financial events.
- Collaborated with a team to present findings to peers and faculty, demonstrating improvements in efficiency and accuracy of information extraction.

Accounts Receivable - Candies Tolteca| Fresno, CA

[September, 2019] – [Present]

- Managed financial records and reconciliation for 30+ client accounts, ensuring compliance and accuracy in reporting.
- Processed and reconciled invoices and sales orders, supporting month-end close and financial audits.
- Provided variance analysis and insights to improve cash flow management.

Projects

Sales Performance Dashboard

- Objective: Visualize financial and operation performance for sales and warehouse functions.
- Technologies: Excel, SQL, Power BI
- Impact: Enabled real-time monitoring of key routes and products, improving decision making.

Material Requirements Planning Program

- Objective: Optimize product inventory and production scheduling.
- Technologies: Excel
- Impact: Reduced stockouts and improved production efficiency.

Fine Tuning For Text Summarization - BankTrack

- Objective: Apply transformer-based NLP to summarize complex financial filings.
- Technologies: Python
- Impact: Streamlined manual extraction of key events, improving efficiency and accuracy.