

LORENZO MACIAS

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CLIENT SOLUTIONS | TECH SALES

Resourceful Solutions Engineer and Client Success Manager with 4+ years of combined experience delivering investment products, payments solutions and legal services. Skilled at translating complex technical workflows into business value, building trust with executives, and coordinating across product, engineering, and customer-facing teams. Strong technical fluency across software and finance holding a series 65 as a NYS certified financial advisor. Proven success in scaling adoption, accelerating onboarding, and driving measurable impact in financial technology, SaaS, and professional services. I am most passionate when I get to combine my knack for client management and people skills with my technical expertise.

CORE SKILLS

Languages & Tools: SQL | JavaScript | Python | React | Node.js | PostgreSQL | REST APIs | SFTPs | Tableau | AWS (basic) | GitHub | JIRA | Salesforce | English | Spanish | Portuguese (intermediate)

Competencies: Enterprise Account Management, SaaS Implementation, Payments & Financial Services, Consultative Sales, API Integrations, Client Onboarding, Strategic Planning, Executive Stakeholder Management, Cross-Functional Collaboration, Data-Driven Storytelling

EXPERIENCE

Masterworks | Account Executive | New York, NY

June 2024 - Dec 2024

- Managed 100+ accounts running consultative cycles for investment on our novel platform for securitized art
- Consistently ranked as a top performer closing \$200K in day one investment, and over \$1M in projected lifetime value at 125% of quota.
- Analyzed investor behaviour, conversion data and funnel performance to shape strategy and coach members across the team
- Acted as a mentor to new advisors, sharing best practices that improved conversion rates across the team.

The Lawyer James | Business Development | New York, NY

Jan 2022 - June 2024

- Managed book of business of 150+ SMB legal accounts, managing renewals and agreements for M&A, real estate transactions & litigation.
- At 150% of quota for booking qualified meetings with c-suite executives generating 2M+ in revenue
- Acted as a strategic advisor to SMB clients by clarifying legal pathways, timelines, and cost tradeoffs across M&A, real estate, and litigation matters.
- Improved client engagement by 25% creating automated collateral and feedback loops that boosted online presence and inbound leads.

Wow Payments | Solutions Engineer | New York, NY

June 2023 - August 2023

- Delivered customized demos of point of sale SaaS systems to English and Spanish-speaking SMBs, highlighting integration workflows and ROI.
- Closed 4 restaurant and retail accounts (~\$24K ARR) and managed a pipeline of 75 prospects while collaborating with AEs on sales strategy.
- Ran timelines for integration and testing ensuring smooth handoffs post sale & onboarding, rest API's/OAuth, inventory management systems etc...

EDUCATION

Full Stack Academy Web Development Bootcamp

March 2025

Software Engineering Certificate

Baruch College, Zicklin School of Business

May 2024

Bachelor of Science in Marketing and Computer Information Systems

FINRA Series 65

June 2024

NYS Certified Financial Advisor