

Max Sands

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EDUCATION

FreeCodeCamp – Online Learning Center for Programming 2024

Business Science University – Online Learning Center for Data Science 2022

McGill University – Desautels Faculty of Management, Montreal, Canada 2019 - 2022
Bachelor of Commerce, Major in Finance, Double Concentration in Accounting & Statistics, CGPA: 3.86/4.00

WORK EXPERIENCE

Choate Hall & Stewart / Choate Investment Advisors, Boston, United States | *Business Analyst* 2022 - Present

- Building several SPAs to more efficiently gather and validate data (Cash Disbursement, Cash Receipts, Account Closing forms, etc.) that needs to get sent to the Operations team for handling/execution.
 - Information was previously sent via email to an Operations Outlook Inbox with no validation, resulting in errors and delays.
 - Used React, JS, HTML, CSS to create several dynamic and conditionally validated HTML forms, with export to standard format in Excel.
- Oversee daily operations of Addepar (portfolio management & data aggregation tool) & spearheaded initial data migration
 - Consulted with Partners and Trust Advisors to gather Ownership Structure data for the entire client base.
 - Used Python to properly format, sanitize, and upload all data.
- Built Ad-hoc Business Intelligence Dashboards & Reports for Management with Python, R, SQL, and Quarto.
 - Account Opening Process Metrics Dashboard
 - AUM & New Business Metrics Dashboard
 - Acquisition Onboarding Report (created a temporary report for management to monitor the onboarding of assets of a newly acquired firm)
- Provided general investment research & ad-hoc solutions for the Investment and Operations teams.
 - Built automated preliminary Investment Analysis report using R and Quarto.
 - By providing a ticker and a list of comps, a report was generated that gathers data from Bloomberg and performs key metric ratio analysis, market share analysis, business segment analysis, etc. to provide a preliminary valuation.
 - Built in-house Monte Carlo Simulation Tool for Retirement Analysis w/ Clients.
 - Included Sensitivity Analysis across several key inputs.
 - Included report generation – both static PDFs and interactive HTML.
 - Built automatic Drift Analysis report using R and Quarto that provided insights on accounts that were drifting off model.

McGill University, Montreal, Canada | *Teaching Assistant – Advanced Business Statistics* 2021 - 2022

- Delivered lectures, mentored/tutored students, and graded all assessments – typically reserved for Graduate Students.

Private Tutor, New Jersey & Montreal, United States & Canada 2018 - 2021

- Tutored students in Mathematics, Statistics, Physics, English, and Finance, and revised college admission essays.

PERSONAL PROJECTS

Dietitian Application 2024 - Present

- Developing a B2B application for private practice dietitians that aims to help create preliminary meal plans for clients given nutritional and budgetary constraints. There is no “industry-standard” tool for dietitians that accomplishes this; much of the work is done manually. The application will also serve as a record for client data, have tele-health functionality, and customizable Client Portals for seamless communication with clients.

Coding w/ Bloomberg – Automating Equity Screens & Preliminary DCFs 2022

- Wrote code in R that utilized Bloomberg’s Desktop API to scrape and gather data for analysis.
 - Automated Bloomberg’s EQS function so that I could run continuous equity screens (i.e. every ‘Saturday’ since MM/DD/YY).
 - Used scraped information to automate the generation of a preliminary DCF for any company; companies with a significant discrepancy between ‘rough draft’ implied share price and 7-day VWAP would garner additional refined analysis.

Coding w/ AWS CloudWatch, AWS Lambda, Gemini, & Kraken – Automating Cryptocurrency Trading Strategy 2022

- Wrote code in Python that connected to Gemini & Kraken APIs and allowed me to place trades if certain conditions were met.

SKILLS AND INTERESTS

Language Skills: Fluent English & French, Basic Spanish

Computer Skills: Python (*Pandas, Matplotlib, Seaborn, Scikit-Learn*), R, HTML, CSS, JavaScript, Basic SQL, React, Next.js

Interests: Data Science, Weightlifting, Guitar, Golf, Chess, Poker, Football, Basketball, Math, Rock Climbing, Reading

Influential Role Models: Ray Dalio, the Kurzgesagt team, members of the All-In Podcast