

Max Sands

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EDUCATION

Business Science University – Online University for Data Science

2022

Certified:

- Data Science for Business w/ R
- ML & High-Performance Time Series Forecasting w/ R
- Predictive Shiny Web Applications w/ R
- Shiny Development w/ R & AWS

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

- Spearheaded data migration project into Addepar – a new system/tool for the Wealth Management Group.
 - Consulted with Partners and all Trust Advisors to gather Ownership Structure data for the entire client base.
 - Used Python to sanitize and properly format all data.
- Built Ad-hoc Business Intelligence Dashboards & Reports for Management with Python, R, SQL, and Quarto.
- Providing general investment research for the Equity and Fixed Income teams.
 - Built automated preliminary Investment Analysis report using R and Quarto.
 - By providing a ticker and a list of comps, a report is generated that gathers data from Bloomberg and performs key metric ratio analysis, market share analysis, business segment analysis, etc. to provide a preliminary valuation.
- Developing unique solutions and models for the Investment and Operations divisions:
 - Built in-house Monte Carlo Simulation Tool for Retirement Analysis w/ Clients.
 - Includes Sensitivity Analysis across several key inputs.
 - Includes report generation – both static PDFs and interactive HTML.
 - Built automatic Drift Analysis report using R and Quarto that provides insights on accounts that are 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

Replicating Ray Dalio's Work: Forecasting the 'Big Cycle' & 'Debt Cycles'

2022 - Present

- Building a system that gathers relevant data and uses Machine Learning to predict several countries' current and future stages of their 'Big' & 'Debt' Cycles with the eventual goal of predicting asset returns across classes, sectors, and geographies.

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/ Amazon Web Services (AWS), 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; automated trading by running the code externally every 5 minutes through AWS CloudWatch & AWS Lambda.

SKILLS AND INTERESTS

Language & Computer Skills: Fluent English & French, Intermediate Python & R

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

Influential Role Models: Ray Dalio, Andrew Huberman, members of the All-In Podcast