**Max Sands** (973) 356-7700 • [www.max-sands.com](http://www.max-sands.com) • [maxsands700@gmail.com](mailto:maxsands700@gmail.com)

**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