

Ryan XXXXX

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Professional Experience

Intellispect

Founder / Product Lead

<https://www.intellispect.co>

Charleston, WV

Jun 2020 - Present

- Launched a SaaS product to help service providers identify nonprofits customers
- Built a data aggregation pipeline using Node.js/Express to automate monthly collection, parsing, cleaning and storage of data on 1.7 million nonprofit organizations to MongoDB & AWS S3
- Built a React/Next.js frontend to allow users to run sophisticated queries and research organizations in our database
- Grew the product to ~25k monthly visitor, thousands of registered users, generating \$50k+ in revenue

BB&T (now Truist Bank)

SVP & Inst. Inv. Manager

Charleston, WV

Sep 2016 – Jun 2020

- Delivered managed investment services for large foundation and endowment clients
- Built and maintained VBA application to fetch and analyze client investment allocations
- Developed internal tooling to automate and streamline outside investment manager vetting process
- Oversaw nearly \$1B in client assets across ~40 client relationships

United Bank, Inc.

VP & Dir. of Inv.

Portfolio Manager

Investment Analyst

Charleston, WV

Mar 2015 – Sep 2016

Oct 2012 – Mar 2015

Jun 2010 – Oct 2012

- Developed and implemented monte carlo simulation model to evaluate and establish division wide investment allocations
- Developed automated tooling to analyze every asset held in the division to identify and flag at-risk assets to be sold
- Managed a team of ~10 investment analysts and portfolio managers
- Had primary responsibility ~\$1.5B in client assets across ~750 HNW & institutional relationships

West Virginia Univ.

Grad. Teaching Ast.

Morgantown, WV

Sep 2009 – Jun 2010

- Instructed a supplemental junior/senior level class on investment analysis and portfolio management

Education & Professional Designations

CFA Charterholder | Pittsburgh Chapter Member

Jun 2014

West Virginia University | MSF Finance

Jun 2010

West Virginia University | BSBA Finance

Dec 2008

West Virginia University | BSBA Accounting

Dec 2008

Skills / Competencies

Development: Javascript, TypeScript, React, Next.js, Node.js, Express, MongoDB, SQL, AWS, Python, TailwindCSS, CSS, HTML

Software: VS Code, Git, GitHub, MS Office, gSuite, Trello, Figma, Adobe Creative Suite