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Informational Interview Tracker

This agenda worksheet will serve as your tracker for the individual conversations you have for your projects in-course, and what you will use to keep record of your informational interviews as a part of the Job Guarantee program. We recommend using the networking tracker to keep track of your outreach attempts, and this worksheet encompasses your preparation, completion, and submission.

Interviewee Name	Martin L.
Interviewee LinkedIn Profile	Because this is a publicly available document I cannot share this persons information.
Date Completed	Apr 16, 2025 (click date to change)
Outreach Message You can use examples from the LinkedIn Connection Requests & Outreach Guide.	Dear Martin, I could not help but notice and be so impressed by your background. I am an aspiring quant and wanted to reach out and introduce myself. Currently, I am enrolled in a Data Science and Machine Learning 7-month Bootcamp at Springboard. It is quite an intensive program! It is kind of a funny story how I found myself at Springboard, but it all began in 2022 when I was trying to model different securities and economic indicators on excel. Only to find that I hit many different challenges just imagine trying to do many of the things you do in python in Excel. I put that on the back burner and finally came to a realization that I must learn Python Programming and Machine Learning to move in the direction of becoming a quant so I can leverage and further develop these models. One of my key areas of thinking in the Springboard Bootcamp was that I could hone in on building economic models on my capstone projects—these are essentially major multipart projects that begin with gathering data and organizing it into a structured format, imputing missing values, exploring the data, conducting feature engineering and finally building machine learning models as well as concluding with data storytelling. I could model the inflation rate e.g. predict it with a variety of Feature Engineered lagged indicators that did not include the Federal Funds rate. It turns out the model I built was able to predict the inflation rate for the last 8 years with a reasonable degree of accuracy and really any 8-year window for the last 85 years. I've attached a screen shot of the prediction. Another interesting finding in my model is that inflation has been underreported due to the manner in which the fed calculates the inflation rate using rent prices rather than housing prices. As part of my program at Springboard I am to conduct

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	informational interviews of people in the data science field in the areas I hope to work in. I thought you would be a great person to conduct that interview with. I would love to learn more about your work. Would you be available for a 15-minute call to do that. Thanks so much! Roger Swartz
Prepared Questions Remember to prepare 5-10 questions based on the length of time you have	1. I think you have an amazing story just looking how you are able to enter in any one of a number of fields and perform at the top. Could you speak to that? What is your philosophy that has enabled this? Philosophy is built on idea of perfection. Idea that data should be well organized and structured. That data should be stored in optimal locations. 2. What enabled the essential leap into this fine financial institution. 3. What does a typical day look like for you? Focus on optimization models of execution of large scale mathematical optimization with emphasis on determining portfolio allocation in microsecond time scale to enable maximal profits and optimal market timing. Uses a variety of programming languages towards this end. It was stressed not to solely rely on Python and SQL and that there is a small 10% learning curve in going to a different programming language. 4. Could you speak to your role as a Vice President. See answer to question 3. 5. I read about large scale mathematical optimization, and it seems that it involves working with thousands of variables. Are there overfitting concerns? There are overfitting concerns although those concerns are not significant. 6. Would you say there is the standard across the industry for machine learning? There is not a standard per se in the financial industry but certainly people might work in one or two of these areas: 1. Predictive Analytics 2. Prescriptive Analytics

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	3. Optimization – His Area 7. Do you design recommendation systems for portfolio allocation? He builds large scale mathematical optimization. 8. What investment time horizon do you focus on in your models. This is not the concern of optimization department. 9. Do you use Neural Networks or supercomputers? The code is executed on his work computer rather than in the cloud or on a supercomputer. 10. What is your take on bootstrapping? Do you feel models do well with that? My understanding is that bootstrapping requires that the dataset be fully representative of the population in its distribution otherwise the results will not be meaningful. Bootstrapping is certainly an interesting area. Although, his department does not rely much on this approach. 11. Do you find yourself generating significant modifications to packages or machine learning models. There are significant modifications to packages and they have generated their own software packages.
Notes from Conversation What did you learn? What were your take aways? Resources shared? Action item?	Resources Shared 1. Streamlet 2. Claude.ai 3. Numerai Action Items: 1. Store DataFrame as SQL databases 2. Consistently practice SQL queries because that is important for interviewers to see you do this instead of generating DataFrames. 3. Get familiar with other platforms aside from Jupyter 4. Display graphs in a platform outside of Jupyter Notebook. 5. Organize code like you would write a book or present a research paper.
Thank You Message Sent	Apr 21, 2025

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Follow Up Message Sent	May 1, 2025
Submission Status	Yes