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DATA ANALYTICS SOLUTIONS USING CLOUD COMPUTING AND DATA LAKE
FOR BUSINESS, ECONOMICS, AND FP&A PROBLEMS;
DEFINE COMPETITIVE ADVANTAGE AND CREATE VALUE;
STRONG MANAGEMENT AND SOCIAL SKILL SET

May 2018 to Date – Senior Data Analytics Lead, Farmers Insurance Group, Los Angeles, California.

- Built out and manage full-scale data lake on AWS cloud infrastructure for Chief Data Organization (CDO) in Fortune 200 company.
- Lead deployment and activation of data lake for machine learning purposes.
- Organize and manage cross-functional analytics SWAT teams developing high value business use cases; rapid deployment of production analytics.
- Drive advanced analytics experiments to produce insights and solutions supporting strategic enterprise objectives.
- Code and perform analytics using R, SageMaker, Ambari, SQL, Git, and data science tools.
- Manage AWS console, data schema; monitor costs, analyze Hive/Hadoop performance.
- Implement solutions for secure logging of usage, queries, and access to data lake.
- Lead classes, create training materials, education curriculum, and knowledge base for end users, analysts, and actuaries.
- Troubleshoot defects and performance issues; manage user acceptance testing.
- Lead implementation of new capabilities.
- Support CDO initiatives to advance customer analytic data and capabilities.
- Conduct regular customer data training sessions.
- Facilitate data lake user group forum, build community, and drive adoption.
- Publish periodic data quality reports to support stakeholder review.
- Provide Level 2 technical support to inquiries regarding customer data.
- Support programs to introduce new customer data capabilities and spotlight use cases.
- Support Data Governance, and Data Stewardship, and California Consumer Privacy Act functions.
- Serve as translator between data analytics and business functions.

March 2016 to February 2018 – Senior Financial Planning Analyst, CallFire Inc., Los Angeles, California.

- Financial data analyst at telecom tech company operating on SaaS model.
- Developed data disciplined, forward-looking, high tech approach to FP&A.
- Clean, structure, and analyze large financial and non-financial data sets.
- Lead master data management project for data base migration and data governance.
- Forecasting and predictive modeling using machine learning methods – regression, decision trees, clustering, etc.
- Utilize Excel, R programming, Domo, AWS EC2 distributed computing infrastructure, MySQL, monte carlo simulation, and QuickBooks.
- Assist operations director and staff in understanding financial implications of their decisions, to improve their ability to manage business.
- Create analyses of special problems, such as churn, scenario analyses, trend analyses, and decision analyses. Assist other analysts and engineers develops financial skills.
- Support company-wide budgeting process across operational departments.
- Provide analysis to identify drivers and improve margin management, costs, and revenue.
- Lead working group involving accounting and engineering to develop system to accurately capture and report capitalization of software.
- Develop process and methods to capture and identify COGS, analyze cost variances and drivers, breaking costs down by vendor, function, and transaction.
- Track financial data (including costs) over time, for use in strategic decision making.
- Write GAAP-compliant financial planning models of business operations, top-down and bottom-up, P&L, Balance Sheet, Statement of Cash Flows and departmental budgets.
- Manage interdepartmental special projects: creation of system for capturing and reporting revenue and costs, and software capitalization process.
- Support business analysis function with resource allocation, planning, and development of projects to enhance product and customer service.

March 2002 to February 2016 – Consultant, FinEx Co. LLC, San Luis Obispo, California.

- Financial data analytics and strategic management consultant to clients in education, agriculture and agribusiness, health care, and technology.
- Data management and data analysis using R-programming, Machine Learning and high-level Excel skills.
- Spin up AWS servers for scalable and sustainable infrastructure.
- Create Excel interface for third party APIs to allow for live data streaming.
- Work with database systems (Domo, MS Azure, AWS, QuickBooks).
- Risk analysis, including economic analysis of risk, costs, loss, and risk.
- Probability studies and statistical analyses, linear analyses, log regressions, random forest, and others.

- Econometric, financial, and operations model building, data simulation, monte carlo simulation and modeling, financial planning and analysis, statistical analysis, revenue and costs analyses.

September 2006 to December 2015 – Lecturer, Agribusiness Department, College of Agriculture, Food, and Environmental Science; Mathematics Department, College of Science and Mathematics; and Finance Department, Orfalea College of Business, Cal Poly, San Luis Obispo, California.

- Taught undergraduate courses in algebra, calculus, financial analysis, strategic planning, risk management, international trade, linear programming, and Excel.
- Built economic and financial data base for California bank consortium addressing problems of master data management, data integrity, and data governance.

September 2004 to December 2005 – Practitioner Faculty, Finance Department, Carey Business School, Johns Hopkins University, Baltimore, Maryland.

- Taught graduate courses in corporate finance and financial mathematics.

November 1999 to March 2002 – Director of Business Development, Atapco, Baltimore, Maryland.

- Financial engineer at private equity company with attached family office.
- Built econometric models for energy trading.
- Led overhaul of corporate financial planning and analysis function.
- Provided analytics support for managing substantial energy and real estate assets.
- Developed strategic asset allocation strategy and risk management strategies for large investment portfolio of corporate and endowment investments.
- Performed risk analysis and risk management using value-at-risk methodology.
- Evaluated investments and managers in venture capital and hedge funds, as well as direct investment opportunities.
- Analyzed and implemented large derivatives transactions.

January 1998 to November 1999 – Director of Risk Management, ACN Power, McLean, Virginia.

- Financial engineer for energy trading company.
- Built econometric models for energy trading.
- Managed $50 million portfolio of energy commodities and derivative contracts.
- Developed risk management policies and systems and ran middle office.
- Produced daily value-at-risk report on portfolio assets.
- Directed trading and accounting operations, and supervised staff.

- Transacted commodities and derivatives trades.
- Used futures, options, and other instruments to develop hedging strategies.
- Set up trading systems software and hardware.
- Responsible for compliance with markets and government regulators.

EDUCATION

- University of California, Los Angeles, Specialization in Data Science, 2018.
- Johns Hopkins University, MBA in Finance, 2000.
- Johns Hopkins University, Graduate Certificate in Investment Management, 2000.
- Georgetown University, School of Foreign Service, BS in international affairs (cum laude), 1981.

CERTIFICATES

- Statistical Learning, Stanford Online, 2016.
- Practical Machine Learning, Johns Hopkins University (Coursera), 2015.
- R Programming, Johns Hopkins University (Coursera), 2015.
- Inspiring Leadership Through Emotional Intelligence, Case Western Reserve University (Coursera), 2015.
- Explore Statistics with R, Karolinska Institutet (edX), 2015.
- Data Science and Machine Learning Essentials, Microsoft (edX), 2015.
- Foundations of Business Strategy, University of Virginia (Coursera), 2014.
- Sabremetrics 101: Baseball Analytics, Boston University (edX), 2014.
- Financial Engineering and Risk Management, Parts I and II, Columbia University (Coursera), 2013-2014.