

WILLIAM NAMAYI

(214) 901-8948 | william.namayi@congressmail.com | www.linkedin.com/in/william-namayi

Professional Summary

Insurance Performance Analyst with 6+ years driving strategic decision-making through financial modeling, data governance, and operational intelligence at P&C insurer (Liberty Mutual) and regulated financial services firm (Apex/FINRA). Delivered measurable impact: \$5.7M risk prevention, 360+ hours saved through automation, 95.9% operational compliance. Expert in transforming complex datasets into executive insights using SQL, Python, and Power BI while managing downstream data infrastructure. Recognized as first point of contact for strategic initiatives, coordinating external consultancies and building governance frameworks. Ready to optimize TPA operations and drive claims performance at Zurich.

Core Competencies

- **Performance & Governance:** Governance Framework Development | Data Flow Management | Regulatory Compliance (SEC/FINRA) | Performance Benchmarking | Quality Control | Risk Assessment
- **Financial Analysis:** Financial Modeling (IRR, NPV, DSCR) | Profitability Analysis | Variance Analysis | Cost-Benefit Analysis | Revenue Forecasting | Business Case Development
- **Data Infrastructure:** SQL (Complex ETL, Schema Design) | Snowflake | Python (Automation, ML) | Power BI (Semantic Models, DAX) | KPI Development | Data Quality Assurance
- **Leadership:** Executive Communication | Cross-Functional Collaboration | Vendor Management | Change Management | SOP Development | Training Delivery
- **Technical:** SAP | Excel (Advanced) | Process Automation | Insurance Operations (P&C, Treasury)

Professional Experience

Liberty Mutual Insurance Company – Plano, TX

Senior Treasury Analyst – Global Treasury (March 2022 – Present)

Strategic Financial Analysis & Performance Monitoring

- Serve as **first point of contact for strategic financial analysis** on enterprise treasury initiatives, providing advanced modeling informing executive leadership decisions on budget allocations and policy changes across business units **including retail claims operations**
- **Developed enterprise governance framework ensuring systematic financial scrutiny** of all business initiatives per leadership mandate; created 15+ automated dashboards enabling performance trend monitoring to identify underperforming areas (3+ major improvements annually, 70% YoY efficiency gain)
- Partner with Internal Audit, Enterprise Transformation, Procurement to deliver variance analysis, spend reconciliation, profitability assessments while maintaining **94% SLA with 5/5 satisfaction rating** on operational tasks

Data Infrastructure & Quality Management

- **Architect and manage downstream data flows** ensuring data quality/integrity across enterprise systems; reduced data errors 83% (118→20) through automated validation frameworks using Power BI
- **Saved 360+ hours annually** developing operational data infrastructure using SQL and complex ETL processes; eliminated manual reconciliation improving data accuracy
- Extract, transform, analyze data from multiple source systems (SAP, Emburse) creating integrated performance views for strategic decision support
- Built monitoring frameworks tracking **95.9% compliant spend** and **96.3% program adoption** across 20,000+ users

Innovation & Leadership

- **Coordinate with external consultancies** and internal stakeholders (Security, Legal, Audit, IT) on strategic initiatives—managed multi-committee approval processes and vendor relationships ensuring alignment on deliverables/timelines
- Led enterprise mobile app migration for 20,000+ users, orchestrating cross-functional teams achieving 95% operational readiness Lead weekly Power BI Center of Excellence sessions, coaching 7+ cross-functional teammates on advanced analytics and automation
- Developed Python ML models for anomaly detection in operational spending patterns, collaborating with Internal Audit on proactive risk identification

Apex Fintech Solutions – Dallas, TX

Treasury/Financial Analyst (June 2019 – March 2022)

Financial Modeling & Compliance

- Developed and monitored comprehensive financial models for **\$8-10B portfolio across 70+ accounts**, tracking Treasury P&L and forecasting Net Interest Income (NII)
- **Built compliance monitoring frameworks** ensuring adherence to **SEC/FINRA regulatory requirements**; performed systematic financial scrutiny ensuring liquidity optimization and customer asset protection
- Created near/long-term revenue forecasts modeling rate change impacts; collaborated with Securities Lending and FP&A on funding strategies managing cost of funds

Performance Analysis & Reporting

- Prepared **quarterly institutional assessment reports** analyzing FDIC member bank financials using **KPI frameworks** to guide investment partner selection and performance monitoring
- Conducted financial statement analysis evaluating solvency and credit risk; identified underperforming relationships recommending strategic adjustments
- Evaluated account performance, investigated variances, assessed adherence to rate covenants and investment policies
- **Extracted/analyzed data from enterprise data warehouse using SQL** for ad-hoc analyses supporting strategic decision-making

Cross-Functional Collaboration

- Partnered with Accounting and FP&A on monthly summaries, interest reports, accruals ensuring accurate records
- Collaborated with Regulatory Reporting on weekly Net Capital Requirement computations ensuring SEC/FINRA compliance
- Performed bank fee analysis identifying cost reduction opportunities while managing bank administration operations

Rotational Associate | June 2019 – February 2020

- Rotated across clearing, settlement, Ops Control, Tax, AML, and Compliance; mapped workflows in Visio, drove process improvements, and authored/updated SOPs to improve efficiency and quality.

Strategic Business Analysis Project

Multifamily Real Estate AI Acquisition Analysis (2025)

- Architected comprehensive Agentic AI financial analysis system preventing \$5.7M in potential investment losses through forensic validation
- Built Python financial calculator implementing key real estate investing KPI (IRR, NPV, DSCR) calculations reducing analysis time 94% (6 hours→5 minutes)
- Engineered automated reporting infrastructure with 19-table relational SQLite database achieving <50ms query performance
- Conducted forensic analysis on 2 properties (220 units, **\$15-21M**) identifying **12-17% overvaluation** through market validation using 30+ independent sources
- Developed scalable operational framework with 5 standardized templates and 305+ pages of documentation

Technical Proficiencies

- Data & Analytics: Snowflake, SQL, Python, Power BI (Expert), Excel (Advanced)
- Development: Database Design, MCP/API Integration, ETL Processes, OAuth2, JSON, CLI Development, Financial Modeling & Valuation, Prompt Engineering
- Platforms: SAP, Emburse, LibertyGPT, Microsoft Copilot, Power Automate
- Financial Tools: Financial Modeling (IRR, NPV, DCF, Scenario Analysis)

Education

The University of Texas at Dallas – Dallas, TX

Bachelor of Science in Finance and Economics (May 2019)