Zack Valavanis

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Client Associate / Analytics Analyst

Dynamic Leader with 4 Years of Expertise in Business Systems, Operations, & Data-driven Analysis

Results-driven professional with over 4 years of experience in financial analysis and client portfolio management, currently transitioning into full-stack software engineering. Proficient in leveraging technologies like React, Ruby on Rails, JavaScript, and Python to solve complex business problems and improve operational efficiency. Proven track record of managing multi-million-dollar portfolios and delivering data-driven insights that enhance decision-making. Passionate about utilizing technical expertise to develop innovative solutions that drive success in both finance and technology sectors.

CORE COMPETENCIES

- Business Systems
- Cost Optimization
- Risk Mitigation
- Project Management
- Performance Management
- Data & Analytics
- Software Engineering
- Full Stack Engineering
- Operational Processes
- Cross-functional Leadership
- Efficiency Improvements
- Stakeholder Management

PROFESSIONAL EXPERIENCE

Actualize Coding Bootcamp, Remote   *2024 – Present*
Junior Software Engineer

Neuberger Berman   *2023 – Present*
Analytics Analyst (2023-Present)

- Managed a $2.7B diversified portfolio across several clients and asset classes, driving growth and consistently generating over 1% alpha relative to market benchmarks.

- Designed and executed tax-efficient investment strategies for diverse client portfolios, achieving up to 10% reductions in capital gains taxes and significantly lowering clients' overall tax burdens.

- Developed and implemented a VBA automation solution that saves 12 hours annually, with strong potential for scaling and improving efficiency across the organization.

- Implemented data-driven strategies that contributed to an increase of approximately $100M in the book over the course of the year, enhancing client trust and engagement.

Accenture   *2022 – 2023*
Real Estate Data Analyst (2022-2023)

- Oversaw the management of a $1.1B portfolio of 37 large commercial office spaces, accommodating thousands of employees, while improving tenant satisfaction scores by 20% and improving operational efficiency.

- Streamlined vendor operations and implemented process improvements, resulting in a cost savings of $200,000, equivalent to a 5% reduction to operating expenses.

- Orchestrated a seamless transition of 12 properties by streamlining vendor management and rent processes, resulting in a 5% reduction in costs due to improved operational efficiency.

▸ Conducted regular audits of operational processes, identifying areas for improvement that led to a 25% decrease in maintenance response times.

Advantage Futures *2020 – 2022*
Risk Analyst (2020-2022)

▸ Streamlined quarterly reporting by implementing VBA macros to automate data compilation, reducing reporting time by over 50% and boosting overall efficiency, allowing for increased focus on client portfolios.

▸ Managed the analysis of volume and open interest in emerging exchange-traded products, including Bitcoin and Ethereum futures, leading to a 15% improvement in portfolio performance tracking.

▸ Conducted data analysis on margin usage, providing insights that reduced risk exposure by 20% and identified optimization opportunities for capital allocation.

▸ Conducted P&L and volume analysis with risk assessments, providing insights that enhanced decision-making and led to a 10% reduction in operational risk and associated costs.

OnShore Security *2019 – 2020*
Assistant to the CFO (2019-2020)

▸ Collaborated with the CFO to extract financial data from QuickBooks & seamlessly integrate it into a front-end database, enabling effective KPI visualization and increasing operational efficiency by 30% and reducing reporting time by 20%.

▸ Managed the creation of comprehensive profit and loss statements for the past 3 years, providing a clearer and more precise financial picture that improved decision-making accuracy by 20% and enabled better forecasting.

▸ Developed and implemented standardized reporting templates that streamlined financial analysis processes, resulting in a 25% increase in reporting accuracy and significantly enhancing strategic planning capabilities.

TECHNICAL SKILLS

Languages / Frameworks: *Ruby, Rails, HTML5/CSS, JavaScript, React.js, REST, Python, Flask, Vue.js*
Data: *PostgreSQL,*
Applications: *Salesforce, Tableau, Office 365, Heroku, Vercel*
Systems: *Windows, macOS*

EDUCATION & CERTIFICATIONS

Bachelor of Science – *University of Colorado, University of Westminster - London*

Tableau For Data Science *– Tableau*

Series 3, Series 7, Series 63, Series 65- *Finra*

Google Project Management Certificate - *Google*