

# Zack Valavanis

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**LinkedIn:** <https://www.linkedin.com/in/zack-valavanis/> | **GitHub:** <https://github.com/zackvalavanis> | **Portfolio:** <https://portfolio-theta-ten-86.vercel.app/>

Finance professional with expertise in portfolio management, financial analysis, and risk assessment, complemented by technical skills in financial automation and full-stack development. Proven track record optimizing investment strategies, reducing operational costs, and automating reporting workflows using VBA, JavaScript, and Tableau. Passionate about leveraging technology to drive financial performance, improve operational efficiency, and deliver data-driven insights.

## TECHNICAL SKILLS

**Core Skills:** Financial Analysis, Financial Reporting, Full-Stack Development, Portfolio Management, Process Automation, Risk Management, Data Analytics, Project Management

**Languages & Frameworks:** VBA, Ruby on Rails, JavaScript, React, Python, HTML5, CSS3

**Databases & Tools:** Tableau, Salesforce, SAP, QuickBooks, PostgreSQL, Microsoft Office (Excel, PowerPoint, Word), Aladdin Wealth, eMoney

**Development & Deployment:** Git, Heroku, Vercel, APIs (REST, JSON), Agile (Scrum, Kanban)

## PROFESSIONAL EXPERIENCE

### Neuberger Berman

2023 – Present

#### Data Analytics Analyst / Client Associate

- Developed automation scripts (VBA) to streamline financial reporting, reducing manual workload by 56 hours annually.
- Managed a \$2.7B diversified portfolio, delivering customized client presentations that tracked key performance indicators (KPIs) such as risk-adjusted returns, sector allocations, volatility, and benchmark performance, enhancing transparency and supporting informed decision-making.
- Created detailed, data-driven client reports and dashboards tailored to portfolio goals; applied VBA-based validation tools to ensure reporting accuracy and integrity.
- Provided outstanding customer-facing support by addressing client needs, offering tailored solutions, and building strong, lasting relationships that enhanced satisfaction and trust.

### Accenture

2022 – 2023

#### Real Estate Analyst

- Leveraged Google Project Management certification to manage a \$1.1B portfolio of 37 commercial office spaces, accommodating thousands of employees, improving tenant satisfaction by 20%, and driving operational efficiencies across multiple sites.
- Streamlined vendor operations and implemented process improvements, achieving \$200,000 in savings and a 5% reduction in operating expenses through optimized vendor management and operational efficiencies.
- Managed the transition of 12 properties, collaborating with the real estate management team to optimize vendor management and rent processes.
- Utilized a Kanban board to track all incoming and outgoing expenses for each location, conducting regular audits of operational processes and identifying areas for improvement.

### Advantage Futures

2020 – 2022

#### Risk Analyst

- 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.

### OnShore Security

2019 – 2020

#### Assistant to the CFO (2019-2020)

- Extracted financial data from QuickBooks and integrated it into an interactive dashboard, enabling KPI visualization that increased reporting efficiency by 30%.
- Led the creation of comprehensive profit and loss statements for the past 3 years, providing a clearer financial picture that improved decision-making accuracy by 20% and enhanced forecasting capabilities.
- Developed and implemented standardized reporting templates, streamlining financial analysis and increasing reporting accuracy by 25%, which significantly enhanced strategic planning and decision-making capabilities.

## EDUCATION & CERTIFICATIONS

**Actualize Coding Bootcamp – Full-Stack Web Development** (Ruby, Rails, JavaScript, React)

**University of Colorado – Leeds School of Business** (B.S. in Business Administration) – Chancellor's Achievement Scholar

**University of Westminster (London, UK)** (Study Abroad Program)

#### Certifications:

- Tableau For Data Science
- FINRA Series 3, 7, 63, 65
- Google Project Management Certificate
- Certification in Blockchain and Digital Assets (CBDA)

## TECHNICAL PROJECTS

**Featured Project: Zen Rolls Website** - Full-stack food ordering platform built with Ruby on Rails and React, simulating a real-world restaurant environment.

- Built a full-stack application using Ruby on Rails and React (JavaScript and TypeScript)
- Integrated Stripe for secure order processing and payments
- Designed a smooth, responsive user experience with dynamic content updates
- Integrated RESTful APIs to manage menu items, customer orders, and reservations