

Zack Valavanis

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Results-driven professional with over 4+ years of experience in financial analysis, client portfolio management, and data-driven insights. Proficient in Ruby on Rails, React, JavaScript, and Python, with a strong foundation in full-stack software engineering and analytics. Skilled in leveraging technical expertise to solve complex business problems, build scalable web applications, and improve operational efficiency. Proven track record of managing multi-million-dollar portfolios and delivering impactful solutions that drive decision-making and enhance business outcomes. Passionate about applying analytical problem-solving to create innovation across finance and technology.

PROFESSIONAL EXPERIENCE

Neuberger Berman

2023 – Present

Data Analytics Analyst / Client Associate

- ▶ Managed a \$2.7B diversified portfolio across multiple client segments, consistently outperforming market benchmarks by 1% in tax alpha, driving both client growth and portfolio optimization.
- ▶ Developed and executed tax-efficient investment strategies for diverse portfolios, achieving up to 10% reductions in capital gains taxes, leading to significant cost savings and improved financial outcomes for clients.
- ▶ Designed and implemented a VBA automation solution, saving 56 hours annually, with scalable potential to streamline workflows and increase efficiency organization-wide.
- ▶ Implemented data-driven strategies that contributed to a \$100M increase in the book value within a year, fostering stronger client trust and driving long-term engagement.

Accenture

2022 – 2023

Real Estate Data Analyst

- ▶ Managed 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.
- ▶ Led the transition of 12 properties by optimizing vendor management and rent processes, reducing costs by 5% through 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

- ▶ 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.
- ▶ Performed regular audits of operational processes, identifying areas for improvement that led to a 25% reduction in maintenance response times and enhanced operational efficiency.

OnShore Security

2019 – 2020

Assistant to the CFO (2019-2020)

- ▶ Collaborated with the CFO to extract financial data from QuickBooks and integrate it into a front-end database, enabling KPI visualization that increased operational efficiency by 30% and reduced reporting time by 20%.
- ▶ 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.

TECHNICAL SKILLS

Languages / Frameworks: Ruby, Rails, HTML5/CSS, JavaScript, React.js, REST, Python, Flask, Vue.js, Material-UI, VBA, PostgreSQL

Core Competencies: Data Analytics & Visualization, Full Stack Web Development (Ruby, Rails, React), Portfolio & Risk Management, Process Optimization (VBA), Financial Modeling & Analysis, Project Management (Agile, Scrum, Kanban)

Applications: Salesforce, Tableau, Office 365, Heroku, Vercel, SAP

EDUCATION & CERTIFICATIONS

Bachelor of Science in Business Administration – University of Colorado Leeds School of Business - Chancellors achievement Scholar, University of Westminster – London

Actualize Coding Bootcamp – Actualize

Tableau For Data Science – Tableau

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

Google Project Management Certificate - Google