

CHUN■CHIEH LORENZO

Strategic Business Data Analyst

Austin · TX · US

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Profile

Strategic Business Data Analyst with 13 + years of end■to■end analytics experience within the wealth■management and financial services sector. Proven expertise in AWS cloud services, advanced SQL, Python (pandas, NumPy, scikit■learn), and data■visualisation tools (Tableau, Power BI) to transform complex ledger, trade■execution and portfolio■construction data into actionable insights. Demonstrated ability to lead cross■functional teams, drive data■quality initiatives, and deliver measurable cost■savings for prime broker■dealer operations.

Skills

Technical & Analytical, Business & Domain, Leadership & Project Management, Soft Skills

Languages

English | – Present

Native speaker

Mandarin | – Present

Professional fluency

Awards

Reporting Cycle Reduction | 2022-01-01

FinEdge Capital

Implemented an AWS■based data pipeline that cut end■of■day reporting from 4 hours to 45 minutes (≈ 81 % faster).

Cost Savings | 2022-01-01

FinEdge Capital

Led cloud migration project saving \$1.8 M annually in infrastructure expenses.

Revenue Growth | 2023-01-01

FinEdge Capital

Predictive rebalancing model generated \$2.3 M incremental revenue in FY 2022■23.

Data Accuracy Improvement | 2022-01-01

FinEdge Capital

Established data■quality framework for ledger tools; accuracy rose from 93 % to 99.5 %.

Employee of the Year (GWS) | 2019-01-01

Global Wealth Solutions

Recognised in 2019 for outstanding cross■functional leadership and innovation.

Certifications

AWS Certified Solutions Architect – Associate | 2021-01-01

Amazon Web Services

Certified Financial Data Analyst (CFDA) | 2020-01-01

Financial Data Institute

Certified ScrumMaster (CSM) | 2022-01-01

Scrum Alliance

Interests

Trail hiking, competitive chess, jazz saxophone | – Present

- Trail hiking
- Competitive chess
- Jazz saxophone (member of local ensemble)

Experience

FinEdge Capital

Business Data Analyst | 01 May 2024 – Present

Lead design and implementation of a new prime broker-dealer data pipeline integrating Beta ledger feeds with AWS Redshift, reducing nightly batch latency from 4 hrs to 1.2 hrs.

- Build and maintain Portfolio Rebalancing Dashboard in Tableau for 150+ advisors, delivering real-time market-condition alerts.
- Partner with trading operations to automate trade-execution logs, cutting manual reconciliation effort by 70 %.
- Mentor two junior analysts on Python data-wrangling and AWS security best practices.

Global Wealth Solutions (GWS)

Lead Business Data Analyst | 01 Apr 2020 – 30 Apr 2024

Managed a team of 8 analysts & data engineers; set analytical roadmap for portfolio construction and rebalancing.

- Oversaw migration of on-premise SQL Server warehouses to AWS Redshift, achieving a 45 % cost reduction.
- Designed Predictive Rebalancing Model (Python, time-series) that improved client portfolio performance by 0.8 % annualized, generating an estimated \$2.3 M incremental revenue.

Global Wealth Solutions (GWS)

Senior Data Analyst | 01 Jan 2017 – 31 Mar 2020

Developed end-to-end reporting suite for alternative-investment fund performance using Tableau & Power BI.

- Authored data-quality standards for Fund Master and Beta ledger entries, raising data accuracy from 93 % to 99.5 %.
- Coordinated quarterly workshops with portfolio managers to translate business needs into technical specifications.

Global Wealth Solutions (GWS)

Data Analyst | 01 Jun 2014 – 31 Dec 2016

Created automated SQL scripts for daily trade-execution summaries, slashing reporting time by 60 %.

- Built Python-based client-worksheet balance extractor, enabling advisors to view real-time balances within the CRM.
- Served as liaison between compliance and IT to ensure GDPR-style data handling.

Global Wealth Solutions (GWS)

Junior Data Analyst | 01 Jul 2011 – 31 May 2014

Assisted in data extraction and cleansing for legacy ledger systems.

- Produced weekly Excel dashboards on portfolio turnover, praised for clarity and timeliness.
- Completed internal AWS Foundations training, laying groundwork for later cloud migration.

Central Bank of Texas

Financial Analyst Intern | 01 Jun 2010 – 31 Aug 2010

Conducted variance analysis on branch-level loan portfolios; presented findings to senior risk officers.

- Supported development of a prototype risk exposure model using VBA, later adopted by the Market Risk Group.

Education & Training

MBA, Finance & Analytics

University of North Carolina, Chapel Hill

01 Jan 2013 – 31 Dec 2015

Result: 3.8/4.0

Bachelor of Science, Finance

University of Texas at Austin

01 Jan 2007 – 31 Dec 2011

Projects

Automated Ledger Reconciliation Engine | 01 Jan 2021 – 31 Dec 2022

Python + AWS Glue – Reduced manual reconciliation time by 78 % for a portfolio of 25 M+ transactions.

Publications

Data■Driven Portfolio Rebalancing: Leveraging AWS & Python for Real■Time Adjustments | 2022-06-01

Journal of Wealth Management

References

Available upon request

Available upon request.