

J WHITE

SR OPERATIONS SPECIALIST & DATA ANALYST

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Certified Data Analyst and Sr. Operations Specialist for LPL Financial with a passion for developing data-driven narratives and complex insights in the world of data. From a diverse background consisting of customer service and theatre studies to currently working with financial data within LPL's Client and Government Reporting team, the drive to work with data, to verify consistency and accuracy, as well as developing and implementing new strategies and partial automation to speed up workflow, is stronger than ever.

WORK EXPERIENCE

Sr. Operations Specialist & Data Analyst

03/2023 – Present

LPL Financial

- Creates macros to automate tasks, enhancing personal and team workflows.
- Performs comprehensive audits of cost basis functions, financial statements, tax forms, and system escalations to ensure accuracy. Identifies and reports discrepancies to management for prompt investigation and resolution.
- Maintains and updates cost basis tax lots, analyzing and reviewing any changes related to transactional adjustments, corporate action activity, and relevant systems and processes.
- Serves as a knowledgeable resource within the department, able to apply complex Cost Basis and Tax Reporting process knowledge to inquiries received.
- Manages daily quality control and error rates, conducts exception review processing, and delivers daily reporting metrics.
- Consistently liaises with operational groups to resolve account discrepancies in fast-paced environments.

Operations Specialist & Data Analyst

11/2022 – 03/2023

LPL Financial

- Reviewed, analyzed, maintained and updated cost basis tax lots for changes due to transactional adjustments, corporate action activity, and related systems and processes.
- Audited cost basis functions and performs audits of statements, tax forms, and system elevations to ensure information accuracy, elevating any inconsistencies to management for investigation and resolution in order to achieve flawless execution.
- Performed daily quality control, manage error rates, perform exception review processing and provide daily reporting metrics.
- Communicated with advisors and other operational groups to resolve various account discrepancies and relays policy related information consistently in fast paced situations.
- Acted as a resource to the department and able to apply complex knowledge of the overall Cost Basis and Tax Reporting processes for inquiries received from internal and external customers and vendors.
- Audited cost basis functions and performs audits of statements, tax forms, and system elevations to ensure information accuracy, elevating any inconsistencies to management for investigation and resolution.

Freelance Data Analyst

Self Employed

- Efficiently conveyed business insights by employing data visualization tools on datasets exceeding 1,200 geographical data points.
- Dedicated approximately 20 hours per week towards attending numerous requirements meetings, identifying effective techniques to extract and streamline data sources based on business needs.

07/2021 – 06/2024

Lead Manufacturing Operator

MirrorMate, LLC

- Managed frame manufacturing production in a warehouse environment, prioritizing quality control by ensuring precise measurements, accuracy in frame style, and zero defects.
- Acquired comprehensive knowledge of equipment issues, maintenance, and calibration, becoming the go-to expert for troubleshooting.
- Actively engaged in bettering processes by generating suggestions, collaborating with colleagues on problem-solving, utilizing critical thinking skills to analyze problems, and making informed decisions.
- Instrumental in driving production growth, with an increase of roughly 60%, from a daily output of approximately 125 frames to consistently exceeding 200 frames per day.

02/2015 – 06/2021

EDUCATION

Bachelor of Arts

Theatre Studies | University of North Carolina at Charlotte

2005 – 2010

Certification

Data Visualization and Analytics | University of North Carolina at Charlotte

2020 – 2021

SKILLS

TECHNICAL SKILLS

Financial Data Analysis | Data Quality Control | Data Extraction | Data Cleaning | Data Visualization
Python | Microsoft Excel | VBA | HTML | JavaScript | SQL | Tableau | AWS

SOFT SKILLS

Communication Skills | Written Communication | Problem-Solving | Collaboration
Organization | Critical Thinking | Passion | Presentation Skills