

Corey LaChance

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I am a Data Analyst with a background in Financial Services. I have acquired a solid portfolio of projects highlighting my capabilities with Excel, SQL, Tableau, Power BI, and Python. With my background in Financial Services, I strive to take my experience and transition into a career in Data Analytics

TECHNICAL SKILLS

- Languages: SQL, Python
- Data Visualization: PowerBI, Tableau, Matplotlib, Visual Analytics Best Practices
- Data Wrangling and Preparation: Excel, PowerBI, PostgreSQL, Python, pandas, APIs, Webscraping
- Statistical Analysis: Descriptive, Inferential, Linear Regression, Correlation
- Non-Technical Challenges of Working with Data: How to take business problems and frame Data Analytics questions from them; Identifying biases in data; Data Analytics Ethics; Application of Business Key Performance Indicators
- Presentation Skills
- Working in Data Teams using Agile ways of working

EXPERIENCE

General Assembly - Data Analytics Immersive, Data Analyst, *Remote* August 2022 – November 2022

- Successfully completed over 500 hours of expert led instruction in Excel, PowerBI, SQL, Tableau, and Python
- Personally created analytics projects, including:
 - Airbnb Outcomes: Built with Excel and PowerBI
 - Capital Bikeshare: Built with SQL and Tableau
 - Superstore SQL Analysis: Built with Excel and SQL
 - DAI Capstone Project – U.S. Airline On-Time Analysis: Built with Excel and Tableau

UBS Financial Services, Wealth Strategy Associate, *Plano, TX* July 2021 – August 2022

- Team Lead for internal analytics projects to support team growth and ensure client satisfaction
- Managed various tasks such as account openings, client transfers, and daily asset movement
- Responsible for compiling client reports and PowerPoints on behalf of the team for annual and semiannual client reviews

JPMorgan Securities, Registered Client Associate, *Dallas, TX* January 2019 – June 2021

- Partnered with two independent Financial Advisors specializing in institutional fixed income products and portfolio management for individual clients
- Managed various trading needs pertaining to equity and fixed income products for both institutional and retail clients
- Responsible for the operational aspects of client relationships such as account maintenance and the processing of account transfers to and from JPMorgan

Wells Fargo Advisors, Client Associate, *Newport Beach, CA* October 2016 – December 2018

- Provided assistance to Financial Advisors and their clients, primarily with general account questions and paperwork processing
- Continually analyzed market trends to discover both value and growth-based investment opportunities for our clients
- Managed the task of updating client investment to ensure accurate investment goals

Western Digital, Data Analyst Intern: Content Solutions, *Irvine, CA* May 2015 - August 2015

- Worked within Content Solution's under the Senior Director of Finance analyzing Western Digital's consumer products, forecasting revenue and product viability
- Assisted WD with assessing the holes in the historical data of MyCloud products, and presented findings to CFO and WD Finance Team

Chapman University, Teachers Assistant: Data Analytics, *Orange, CA* September 2014 - December 2014

- Directly supported the Assistant Dean of Argyros School of Business and Economics.
- Conducted weekly Supplemental Instruction sessions in Business Analytics, utilizing advanced Microsoft Excel skills in real world applications

EDUCATION

- **Chapman University**, Orange, CA Completion: May 2016 Bachelor of Science in Business Administration, Emphasis in Business Finance
- **General Assembly**: Certificate in Data Analytics specializing in Advanced Excel, SQL & Tableau