**Max Sands** (973) 356-7700 • [www.max-sands.com](http://www.max-sands.com) • maxsands700@gmail.com

**EDUCATION**

**Business Science University** – Online University for Data Science 2022

*Certified:*

* *Data Science for Business w/ R*
* *ML & High-Performance Time Series Forecasting w/ R*
* *Predictive Shiny Web Applications w/ R*

**McGill University** – Desautels Faculty of Management, Montreal, Canada 2019 - 2022

*Bachelor of Commerce*, Major in Finance, Double Concentration in Accounting & Statistics, CGPA: **3.86**/4.00

**WORK EXPERIENCE**

**Choate Hall & Stewart / Choate Investment Advisors**, Boston, United States | *Business Analyst* 2022 - Present

* Spearheaded data migration project into Addepar – a new system/tool for the Wealth Management Group.
* Consulted with Partners and all Trust Advisors to gather Ownership Structure data for the entire client base.
* Used Python to sanitize and properly format all data.
* Built Ad-hoc Business Intelligence Dashboards & Reports for Management with Python, R, SQL, and Quarto.
* Provided general investment research for the Equity and Fixed Income teams.
* Built automated preliminary Investment Analysis report using R and Quarto.
	+ By providing a ticker and a list of comps, a report was generated that gathers data from Bloomberg and performs key metric ratio analysis, market share analysis, business segment analysis, etc. to provide a preliminary valuation.
* Developing unique solutions and models for the Investment and Operations divisions:
* Built in-house Monte Carlo Simulation Tool for Retirement Analysis w/ Clients.
	+ Included Sensitivity Analysis across several key inputs.
	+ Included report generation – both static PDFs and interactive HTML.
* Built automatic Drift Analysis report using R and Quarto that provided insights on accounts that were drifting off model.

**McGill University**, Montreal, Canada | *Teaching Assistant – Advanced Business Statistics* 2021 - 2022

* Delivered lectures, mentored/tutored students, and graded all assessments – typically reserved for Graduate Students.

**Private Tutor,** New Jersey & Montreal, United States & Canada 2018 - 2021

* Tutored students in Mathematics, Statistics, Physics, English, and Finance, and revised college admission essays.

**PERSONAL PROJECTS**

**Automating Private Investment Related Workflows** 2024 - Present

* Developing tool that ingests Private Investment related documents, classifies them & extracts relevant information w/ ML, and stores the information for the user.

**Replicating Ray Dalio’s Work: Forecasting the ‘Big Cycle’ & ‘Debt Cycles’** 2022 - 2023

* Building a system that gathers relevant data and uses Machine Learning to predict several countries’ current and future stages of their ‘Big’ & ‘Debt’ Cycles with the eventual goal of predicting asset returns across classes, sectors, and geographies.

**Coding w/ Bloomberg – Automating Equity Screens & Preliminary DCFs** 2022

* Wrote code in R that utilized Bloomberg’s Desktop API to scrape and gather data for analysis.
* Automated Bloomberg’s EQS function so that I could run continuous equity screens (i.e. every ‘Saturday’ since MM/DD/YY).
* Used scraped information to automate the generation of a preliminary DCF for any company; companies with a significant discrepancy between ‘rough draft’ implied share price and 7-day VWAP would garner additional refined analysis.

**Coding w/ AWS CloudWatch, AWS Lambda, Gemini, & Kraken – Automating Cryptocurrency Trading Strategy** 2022

* Wrote code in Python that connected to Gemini & Kraken APIs and allowed me to place trades if certain conditions were met

**SKILLS AND INTERESTS**

**Language Skills**: Fluent English & French, Basic Spanish

**Computer Skills**: Python (*Pandas, Matplotlib, Seaborn, Scikit-Learn*)R; Basic HTML, CSS, JavaScript, SQL

**Interests**: Data Science, Weightlifting, Guitar, Golf, Chess, Poker, Football, Basketball, Math, Rock Climbing, Reading

**Influential Role Models**: Ray Dalio, Andrew Huberman, members of the All-In Podcast, the Kurzgesagt team