Max Sands

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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.
    - o 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.
    - o Included Sensitivity Analysis across several key inputs.
    - o 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