FELIPE SANTOS BORGES

Charlotte, NC | borges.felipe1705@gmail.com | (786) 816-1366 | LinkedIn | fsborges.com

Dear Hiring Team,

For three and a half years, my job was helping people decide what to do with their money. As a financial advisor at Valor Investimentos, I learned that analysis is only half of a good recommendation. The other half is making it clear enough that someone acts on it. I brought that lesson with me into data, and it still shapes how I work.

At Valor, I used Salesforce funnel data to choose which clients to follow up with and when, and grew the assets I managed from $3 million to $14 million in two years. During my MBA in Financial Analytics & Modeling at UNC Charlotte, which I finished with a 4.0, I worked as a research analyst for the Marketing Department Chair. I built a Python pipeline for 146,758 Google reviews that reached 97.9% match coverage across three APIs, automated recurring research reports to cut the time they took by about 70%, and brought a projected $2,000+ in data costs down to about $30 by batching API calls. Alongside school, I also ran a small e-commerce brand, where ad and conversion data decided where each dollar went.

I also build independent projects to practice the parts of analytics a résumé line can't show: framing the question, checking the data, and deciding what the evidence actually supports. The most recent, Chestnuts, is a fictional investing app I created from scratch. I wrote the rules for how users move from signup to their first investment, generated 10,000 synthetic users, modeled the data with SQL and dbt, and designed and analyzed a simulated A/B test on the funding step. Deposits rose, but first investments, the real goal, came back inconclusive, so I recommended a larger retest instead of a rollout. The deposit lift would have made an easier headline. Staying tied to the outcome that matters is the habit I most want to bring to a team.

I'm looking for an analyst role where the work feeds real decisions about a product, a customer, or where money goes. I bring SQL, Python, dbt, Tableau, and Excel; a finance background that keeps me comfortable with numbers and tradeoffs; and years of explaining those tradeoffs to people who needed a straight answer. I'm also a native speaker of Portuguese and English and proficient in Spanish.

My portfolio has the full write-ups for my projects, from a SQL credit-risk analysis to a Disney DCF valuation. I'd welcome the chance to talk about where I could help.

Best,
Felipe Santos Borges