

Allan Khariton, PMP

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 [LinkedIn Profile](#)

 [GitHub Profile](#)

 [Data Portfolio](#)

SKILLS & CERTIFICATIONS

- Certifications: PMP, Series 7, Series 99, EIT
- Power BI, Power Apps, Power Automate, SQL (Oracle, Snowflake, T), MS Office, Python, Pandas, Seaborn
- Languages Spoken: English, Russian

DATA-DRIVEN PROJECTS & PRESENTATIONS

- Presented to 30 attendees at Power BI Days DC about Field Parameters and Bookmarks. See presentation [here](#)
- Created a BI report summarizing trends and insights from my fantasy football league. See link to project [here](#)
- Developed a customer churn model in Python that predicted churn with 79% accuracy. See link to project [here](#)

EDUCATION

Carnegie Mellon University, Pittsburgh, PA

Bachelor of Science in Civil Engineering

EXPERIENCE

Edward Jones, Rockville MD (remote)

Sr FP&A Analyst

Jan 2026 – Present

- Automating monthly financial reporting, decreasing report generation time by 50% and allowing all 5 finance teams to develop standard reporting packages for business leaders firmwide
- Scaling high net-worth client data processing and allowing the business unit to review, influence and forecast performance on 20+ billion dollars of potential business
- Preparing quarterly business review package for our executive leadership team, including gathering data and insights in collaboration with stakeholders firmwide

Sr Data & BI Analyst

Nov 2024 – Jan 2026

- Serving as a BI Champion and helping others by leading weekly office hours, answering ad hoc user questions, coordinating learning sessions, and mentoring 3 junior analysts
- Automated KPIs and created a streamlined Power BI monthly business review report for 10+ general partners
- Created a scalable process to track critical document processing data, allowing the division to create consistent KPIs and near real-time tracking across our Snowflake, Oracle, and Salesforce systems

Data & BI Analyst II

Aug 2022 – Nov 2024

- Partnered with finance team to create an Operational budget report in Power BI, processing 200+ million dollars of spend data with Power Query to hold departments accountable to their plans
- Utilizing Power Automate and DAX to write automated quality assurance unit tests, allowing analysts to focus on core work while proactively solving data integrity issues when alerts are triggered
- Combined data from SQL queries, Excel, and SharePoint in Dataflows report on billions of trades and thousands of Salesforce data points for Trading executives, streamlining their quarterly review processes

Assistant Project Manager, Commodore Builders, Boston MA

February 2020 – August 2022

Project Site Experience:

- Led weekly meetings with senior executives, resulting in positive client rapport and quick issue resolution
- Led daily standup meetings, ensuring team members made consistent progress and had no blockers
- Wrote scope of work statements for vendors, and managed contractors throughout the project lifecycle
- Utilized financial software to input, update and submit change orders and monthly budget status reports

Business Intelligence Analyst – Internal Operations

- Visualized data in Power BI to build financial dashboards, enabling leaders to efficiently assess project performance against budgets
- Transformed data in Power Query to develop quality and safety dashboards for project-level performance reviews, in collaboration with senior Safety and Tech leadership
- Developed a Power BI punch list dashboard, which helped the team track and close punch list items in 6 days
- Created a contractor dashboard that allowed teams to quantify contractor performance based on project-level data

Engineer, Clark Construction, Washington DC

February 2018 – January 2020

Origin Ballston – Interior Finishes Manager

- Directed interior finish work for 406 apartments, ensuring resources were allocated efficiently and avoiding over \$100,000 in fees.
- Led semi-weekly meetings with stakeholders to ensure on-time completion of work totaling \$100,000,000
- Helped develop monthly invoices, leading to on-time project payment

Strategy, Research and Development - Engineer

- Developed a research plan to optimize the change order process and save millions of dollars annually
- Created and presented to C-suite executives, resulting in quick project approval and positive rapport
- Led app vision development, gathering executive and user requirements for enterprise deployment
- Created mySQL scripts to analyze manpower, and deployed to a Tableau dashboard for project executives

CIVIC ENGAGEMENT

Volunteer Analyst, Code For Boston

May 2022 – June 2023

- Worked with a team of 5 analysts on the Urban Heat Pump Accelerator civic tech project, with a goal of increasing outreach and adoption of heat pumps in the Boston area to help Massachusetts meet its Clean Energy and Climate Plan
- Used Python and Jupyter notebooks to ingest, transform and visualize available census data to determine which variables would be feasible to use in our analysis
- Developed a 7 variable scoring model to rank how likely households may be to convert from their existing heating systems to heat pumps, in collaboration with officials from the Urban League of Eastern Massachusetts
- Created a data pipeline and worked with web developers to integrate code into a web app, for use by those conducting homeowner surveys and sales pitches