

KAI TROTTER

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PROFESSIONAL SUMMARY

Investment operations and financial analytics professional with 4+ years of experience in asset management, banking, and financial services. Direct experience supporting fixed income portfolio operations at a global asset management firm, with a demonstrated track record of zero-error reconciliation, performance reporting, and compliance-sensitive data integrity. M.S. in Data Science provides a strong quantitative foundation for risk analytics, scenario modeling, and investment performance reporting. Proficient in Python, SQL, and Excel; experienced in applying analytical and AI tools to deliver actionable insights for investment stakeholders.

PROFESSIONAL EXPERIENCE

REAMS ASSET MANAGEMENT

April 2025 – June 2026

Wire Operations Analyst

- Supported fixed income portfolio operations by reconciling 10 asset accounts across global offices, maintaining zero-error standards in a compliance-sensitive, deadline-driven investment environment.
- Developed Excel-based reporting tools leveraging VLOOKUP that reduced operational task completion time by 50%, improving data accuracy and analytical throughput available to investment team stakeholders.
- Partnered with cross-functional teams across global offices to investigate and resolve transaction discrepancies, ensuring accuracy and integrity of investment records aligned with financial controls and risk guidelines.
- Monitored data consistency and timeliness across fixed income accounts, applying structured quality controls to support compliance alignment within the firm's investment infrastructure.

REN INC.

October 2024 – March 2025

Client Support Specialist

- Performed structured root-cause analysis on 50+ daily cases, validating financial reporting data and maintaining system reliability across internal platforms.
- Synthesized recurring data integrity patterns into actionable findings for internal stakeholders, improving reporting accuracy and analytical workflows.
- Collaborated across operations and reporting functions to ensure data accuracy and system integrity, supporting quality assurance standards in a financial services environment.

INDIANA MEMBERS CREDIT UNION

June 2022 – October 2024

Universal Member Services Representative (Team Supervisor)

- Supervised a team of 6 in a federally regulated banking environment, coaching on accuracy, regulatory compliance, and operational standards.
- Administered financial accounts and products across a high-volume compliance-driven environment, maintaining accuracy aligned with internal audit standards.
- Translated complex financial products and regulatory requirements into clear, actionable guidance, maintaining compliance at every stakeholder touchpoint.

ROYAL UNITED MORTGAGE

December 2021 – June 2022

Lending Consultant

- Managed loan files through the full origination-to-close cycle, ensuring documentation accuracy and compliance with federal lending regulations and underwriting standards.
- Recognized as top performer among 20 for analytical rigor, operational discipline, and detail-oriented execution in a high-stakes financial environment.

PROJECTS

Value Investing & Financial Modeling Externship | Extern, guided by Yinan Zhao

- Performing comprehensive underwriting-style analysis on small-cap value companies from the Russell 2000, including financial statement analysis, comparable company analysis, and DCF valuation to assess risk, return, and investment thesis.
- Reviewing SEC filings, insider trading activity, and analyst ratings to identify key risks and market catalysts affecting company valuations.
- Drafting a professional investment memo and preparing to present buy/sell recommendations to stakeholders, mirroring the investment committee materials and decision-making process used in credit and equity investing.

Multifamily Property Financial Model | Excel

- Built a financial model evaluating capital structure, cash flow, and credit metrics for a multifamily property, including valuation, debt service coverage ratio, and investment return analysis (cap rate, cash-on-cash return).
- Applied sensitivity analysis across financing structures to assess risk and repayment capacity under multiple scenarios, mirroring underwriting analysis used in credit investing.

EDUCATION

EASTERN UNIVERSITY

May 2026

Master of Science in Data Science

INDIANA UNIVERSITY

December 2021

Bachelor of Arts in Media (Advertising), Specializing in Media Psychology

CERTIFICATIONS & LEADERSHIP

AWS Certified Cloud Practitioner | Active

CFA Level I Candidate | In Progress

SKILLS

Excel (Advanced: VLOOKUP, pivot tables, financial modeling) | Python | SQL | Tableau
Fixed Income Portfolio Operations | Account Reconciliation | Performance Reporting | Data Integrity
Quantitative Analysis | Risk & Compliance Monitoring | Stakeholder Reporting | AI-Driven Analytics
Cross-Functional Collaboration | Regulatory Compliance | Attention to Detail