

Jacob Ferris

Financial Planning | Business Analysis | Data Analytics

Dover, NH • (203) 942-1179 • jacob@jacobferris.com • <https://www.linkedin.com/in/jacobferris>

PROFESSIONAL SUMMARY

Finance professional with experience developing personalized financial strategies, analyzing business performance, and leveraging technology to improve operational efficiency. Recognized for combining analytical thinking with technical problem-solving to build data-driven solutions that support business growth, strengthen client relationships, and improve decision-making.

AREAS OF EXPERTICE

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|----------------------|---------------------------|-----------------------|
| • Financial Planning | • Financial Modeling | • Risk Analysis |
| • Business Analysis | • Budgeting & Forecasting | • Data Visualization |
| • CRM Management | • Business Intelligence | • Process Improvement |
| • Strategic Planning | • AI Integration | • Decision Support |

WORK EXPERIENCE

Financial Representative

May 2025 - February 2026

Northwestern Mutual, Portsmouth, NH

Developed comprehensive financial plans for individuals, families and businesses while leveraging data analysis, CRM systems, and custom workflow improvements to support business growth and long-term client success.

- Improved business development strategies by analyzing sales performance, client engagement, and market trends to support data-driven decision making.
- Strengthened client outcomes by evaluating goals, cash flow, risk, and long-term planning objectives.
- Enhanced operational efficiency by creating analytical dashboards, improving CRM management, and streamlining business workflows.

Logistics Supervisor

August 2019 - May 2025

Clancy Relocation and Logistics, Patterson, NY

Managed logistics operations for residential, commercial, and corporate clients by coordinating personnel, inventories, scheduling, and project execution while maintaining exceptional customer service.

- Optimized daily operations by coordinating personnel, schedules, inventories, and resources across multiple concurrent projects.
- Maintained operational accuracy by reviewing, verifying, and managing detailed inventory documentation throughout each project.

PROFESSIONAL PROJECTS

Senior Thesis | [Diminishing Democracy](#)

August 2023 - May 2024

- Developed a quantitative research model analyzing the relationship between governance, macroeconomic indicators, and democratic performance using statistical analysis and predictive modeling.
- Produced 40+ pages of research integrating historical analysis, public datasets, economic forecasting, and quantitative modeling to support long-term conclusions and axioms.

Financial Intelligence Platform | jacobferris.com

February 2023 - Present

- Engineered a financial intelligence platform that aggregates, normalizes, visualizes, and projects 300+ macroeconomic, government, financial, and blockchain datasets through custom analytical tools and interactive dashboards.
- Accelerated financial research and decision-making by developing proprietary visualizations, forecasting, and blockchain monitoring tools within a centralized analytics environment.

EDUCATION

Bachelor of Arts, Political Science | Minor: Economics & Criminal Justice

May 2024

Western Connecticut State University, Danbury, CT

TECHNICAL SKILLS

Microsoft Excel | SQL | Data Visualization | API Integration | JavaScript | Python | Java | PHP | MySQL | Git