

Magoma Charles Kevin

Finance & Business Development Professional

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PROFESSIONAL SUMMARY

Finance and accounting professional with 4+ years of experience spanning financial advisory, business development, and data analytics — combining deep domain expertise with Python/SQL fluency, technical writing, and the rigorous evaluation skills that AI-training and evaluation projects demand.

4+ Years Experience \$3.5M+ Pipeline Generated \$20M Client Asset Growth 60% Reporting Time Cut

EXPERIENCE

Data & Reporting Analyst (Contract)

May 2025 – Present

Independent / Freelance — Houston, TX (Remote)

- Build automated reporting pipelines in Python (pandas, openpyxl) and SQL that consolidate multi-source financial data into executive-ready dashboards, cutting manual reporting time by 60%.
- Author technical documentation, data dictionaries, and metric definitions for internal models — ensuring every assumption, edge case, and source is traceable, the same documentation rigor applied to high-quality domain annotation.
- Perform fact-checking and quality review on AI-generated financial content, flagging factual errors, hallucinated citations, and imprecise terminology (e.g. conflating "alpha" with "excess return") before publication.
- Translate ambiguous business questions into structured analytical tasks with clear acceptance criteria and reviewer-friendly documentation — the same skill that makes for reliable, auditable evaluation work.

Business & Real Estate Consultant

Oct 2024 – Apr 2025

PAC Consulting — Houston, TX

- Achieved 125% of business development targets through strategic client acquisition and relationship management with high-net-worth prospects.
- Sourced 15+ qualified leads monthly through a consultative approach, converting them into long-term consulting partnerships.
- Collaborated with business partners to align client acquisition efforts, creating \$2.1M in new business pipeline across real estate and consulting services.
- Overcame objections around investment risk and market volatility by providing data-driven insights and comprehensive market analysis.

Financial Advisor

Oct 2021 – Apr 2024

Equitable Advisors — Houston, TX

- Exceeded performance benchmarks by 130% through persistent prospecting and relationship-building with high-net-worth decision-makers.
- Generated 12+ sales-qualified opportunities monthly by conducting in-depth financial assessments and identifying wealth-accumulation opportunities.
- Partnered with senior advisors to provide actionable insights on client interactions and market trends, driving portfolio growth and revenue expansion.
- Navigated complex financial objections and compliance requirements, maintaining consistent client acquisition and portfolio management across diverse investment strategies.

CORE SKILLS

Domain Expertise

Financial Analysis • Investment Strategy • Accounting Principles • Wealth Management • Real Estate Finance • Risk Assessment • Regulatory Compliance • Market Research

Sales & Business Development

Lead Generation • Lead Qualification • Strategic Prospecting • Cold Calling • Consultative Selling • Client Relationship Management • Pipeline Management • CRM

Tools & Technology

Salesforce • Sales Navigator • ZoomInfo • Apollo.io • Microsoft Excel • Financial Modeling

Technical & Data

Python (pandas, openpyxl) • SQL • Tableau / Power BI • Technical Writing • Data Visualization • Git / Version Control • Prompt Engineering • Documentation / Data Dictionaries

Analytical & Communication

Data-Driven Analysis • Written Communication • Fact-Checking • Research • Critical Evaluation • Attention to Detail

KEY ACHIEVEMENTS

\$3.5M+ — Pipeline Generation

Generated over \$3.5M in qualified pipeline across multiple roles through strategic prospecting and lead qualification, consistently sourcing 12–15 sales-qualified leads per week via targeted outreach and consultative selling.

\$20M — Client Portfolio Growth

Guided 50+ clients in strategic business growth and real estate investments, collectively boosting their asset value by \$20M while maintaining relationships with 100+ high-net-worth clients.

EDUCATION

BBA in Accounting and Finance

State University of New York at Old Westbury — Old Westbury, NY

Bachelor of Business Administration with a concentration in Accounting and Finance — foundational expertise in financial reporting, corporate finance, investment analysis, and accounting principles.

CERTIFICATIONS & CONTINUING EDUCATION

Google Data Analytics Professional Certificate

Google / Coursera — ID: GDA-2025-KM — Skills: SQL, R, Tableau, Data Cleaning, Data Visualization

(2025)

Python for Finance Specialization

Coursera — ID: PYF-SPEC-2025 — Skills: pandas, NumPy, Financial Modeling, Time Series

(2025)

Machine Learning Specialization

DeepLearning.AI / Coursera — ID: MLS-2024-KM — Skills: Supervised Learning, Neural Networks, Model Evaluation

(2024)

Prompt Engineering for LLMs

DeepLearning.AI — ID: PE-LLM-2024 — Skills: Prompt Design, RLHF, LLM Evaluation

(2024)

AWARDS

Life Leaders Award (2023)

Equitable Advisors — Ranked in the top tier of financial advisors for outstanding client acquisition and portfolio performance.

Fast Start Award (2022)

Equitable Advisors — Recognized among top representatives in the new hiring class for exceptional business performance within the first 60 days (20k credits).