Jeremy Hamann

Brokerage Operations | Internal Tools Engineering & Automation | Series 65

Raleigh, NC • jeremy@jeremyhamann.dev • jeremyhamann.dev

Professional Summary

Brokerage operations specialist (Series 65) and full-stack internal tools engineer who builds the software an RIA runs on. At Evergreen, built 5 production apps in TypeScript and Python on GCP with multi-environment GitHub Actions CI/CD, Terraform, and 1,600+ merged pull requests. Pairs custodial operations knowledge (ACATs, trading, portfolio drift, cost basis, billing, Form ADV) with AI-assisted engineering and Gemini document automation.

Licenses & Certifications

- Series 65 – Uniform Investment Adviser Law Examination

Professional Experience

Evergreen.ai — Raleigh, NC

Brokerage Operations Associate & Internal Tools Engineer Oct 2025 – Present

Primary builder of the operations team's internal applications, CI/CD, and workflow automation

- Built and shipped 5 production internal applications for stakeholders across advisory, trading, client service, operations, and compliance; authored **1,600+ merged pull requests** and closed 240+ Linear issues as primary engineer, leveraging AI coding agents (Claude Code, Cursor, Codex).
- Lead engineer and production owner of Always-On-Advice, the firm's advisor and operations platform (Next.js, PostgreSQL with row-level security, Okta SSO, Cloud Run, Terraform); shipped household views, CRM duplicate detection, the ACAT lifecycle, Command Center, data health checks, and audit logging, and cut household load time from **~5s to ~2.1s** across 350+ approval-gated production deploys.
- Designed the CI/CD standard for every app: GitHub Actions with keyless GCP Workload Identity Federation, production approval gates, Terraform dev/prod stacks, migration-safety checks, CodeQL/Wiz/Dependabot scanning, Playwright smoke tests, and automated rollback, supporting **1,000+ successful production deploys**.
- Built a Gemini-powered ACAT statement pipeline (Python/FastAPI, Vertex AI, Cloud Run, 15-layer rule engine) for the Operations team; parsed 320+ statement files for ~40 client households and cut per-client transfer analysis from **30–45 minutes to under 60 seconds**.
- Created and led development of the ACAT Tracker, the Operations team's system of record for **640+ account transfers** (Next.js, PostgreSQL, Cloud Run): tracks status, fees, and reimbursements with a field-level audit trail across 37 custodians, reconciles ACAT pipeline positions against Apex, and serves AoA via REST API.
- Sole engineer of the Trade Request platform (Express REST API, React, PostgreSQL, Slack, GCP) used daily by the firm's 4-person trading team, covering advisor trade submission, trader approval, an asset-location engine, and a portfolio drift engine with multi-source cost basis and Slack alerts; shipped through 126 production deploys.
- Led the CCO's Form ADV AUM dashboard (FastAPI, React, IAP, Metabase) via a formal production-readiness program.
- Built and own 16 production n8n workflows connecting Practifi, Schwab and Apex custodial data (AWS S3), Zendesk, Gmail, Google Drive, Slack, and Treasury data to internal apps via REST APIs and webhooks; version-controlled with guarded promotion and centralized error alerting, running 1,600+ times at **98.8% success** in a recent two-week window to automate withdrawal, funding, and mutual fund tasks and CRM sync.
- Owned the firm's monthly advisory fee billing across Apex and Schwab for roughly **$124M in AUM**, cutting the billing cycle **from the 14th–15th of each month to the first 4 days** and **eliminating the need for one full-time role**. Fully automated Schwab billing with an n8n workflow that ingested custodian files, calculated fees, flagged cash shortfalls, and routed the file to the controller for review; streamlined Apex billing by maintaining fee tiers, validating Alphathena average-daily-balance calculations, and checking fees against available cash before controller-reviewed submission.

Blue Trust — Alpharetta, GA

Senior Investment Operations Analyst / Team Lead Aug 2025 – Oct 2025

Promoted to Senior Analyst and Team Lead (double promotion)

- Led centralized trading operations and portfolio rebalancing initiatives across advisor teams, ensuring precise portfolio strategy alignment and timely execution.
- Developed, documented, and implemented internal procedures and checklists to streamline routine trade workflows and enhance firm-wide efficiency.
- Spearheaded key operations projects, including the integration of capital gains budgets into centralized trading workflows.

Investment Operations Analyst, Trading Jan 2024 – Aug 2025

- Researched, tracked, and resolved complex trade discrepancies and operational challenges to minimize firm risk and improve trade accuracy.

CAPTRUST — Raleigh, NC

Centralized Trading Intern May 2023 – Dec 2023

- Created portfolio rebalance trades for multimillion-dollar and institutional accounts using Excel.
- Consolidated duplicate data sources into a centralized database, improving data accuracy, accessibility, and analysis.
- Designed an optimized screen layout proposal for trading platforms to enhance real-time analytics and data visualization.

Education

Bob Jones University Aug 2019 – Dec 2023

Bachelor of Business Administration (BBA) in Finance

Skills

- **Engineering:** TypeScript, Python, SQL (Amazon Redshift via Metabase and Hex), Next.js, React, Express, FastAPI, Prisma, PostgreSQL
- **Cloud & DevOps:** Google Cloud Platform (Cloud Run, Cloud SQL, Vertex AI, IAP, Secret Manager), Terraform, Docker, GitHub Actions, AWS S3
- **Quality & Security:** Playwright, Vitest, pytest, CodeQL, Wiz, Okta/OAuth role-based access
- **AI & Automation:** Gemini document extraction, MCP servers, AI coding agents (Claude Code, Cursor, Codex), n8n, REST APIs, Webhooks, System Integrations
- **Wealth Management Platforms:** Salesforce/Practifi, Schwab, Apex, Orion OMS, RedBlack, Alphathena, Metabase, Hex, Zendesk
- **Operations & Trading:** Centralized Trading, Portfolio Rebalancing, ACATs, Advisory Fee Billing, Compliance