

# JASON WHITLOCK

## SOFTWARE DEVELOPER

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**SKILLS**   JavaScript, Python, HTML5, CSS3, Ruby, PHP, Flask, SQL, English, Spanish

### PROJECTS

**MutantMerge** | *(React/Redux, Express, Express-Validator, Sequelize, JavaScript, JWT, CSS, HTML, JSX)*   [live](#) | [github](#)

MutantMerge is a full-stack clone of Meetup, showcasing CRUD (Create, Read, Update, Delete) capabilities across various features.

- **Mastered JWT for Enhanced Security:** Gained expertise in implementing JWT for authentication and authorization, enhancing application security and user session management. This experience deepened my understanding of secure web practices and the importance of protecting user data.
- **Advanced State Management with Redux:** Through the integration of Redux for state management, I learned to efficiently manage application state, leading to improved UI performance and user experience. This process honed my skills in designing scalable, responsive web applications.
- **Leveraged Sequelize for Data Scalability:** Overcoming data management challenges with Sequelize taught me the value of ORMs in simplifying database interactions and scalability. This knowledge expanded my capabilities in backend development and data architecture.

**Hack/squat** | *(Python, Flask, JavaScript, React, Redux, CSS, HTML, Postgres, Alembic, Render, AWS)*   [live](#) | [github](#)

Hack/Squat aims to be the workout app I've always wanted, but never had. As an Olympic lifter myself, data is the key to growth and many apps in this space provide some of the desired functionality, but tend to leave a lot on the table.

- **Data-Driven Feature Implementation:** Learned to harness the power of Postgres and Alembic for data management to create personalized workout plans and tracking. This challenged me to think critically about data structures and user needs, significantly improving my database design and management skills.
- **Optimized User Experience with React and Redux:** Through developing a responsive and intuitive UI, I mastered advanced React and Redux techniques. This experience taught me the importance of state management and component reusability in building scalable web applications that engage users effectively.
- **Integrating Diverse Technologies for a Comprehensive Solution:** The integration of Flask with React, Redux, and AWS for backend services and deployment pushed my boundaries in full-stack development. I learned to navigate and connect different technologies seamlessly, ensuring a robust, scalable app infrastructure that supports complex workout data analytics.

### EXPERIENCE

Wealth Management Professional

*SmartAsset, Fisher Investments, JP Morgan, Merrill Lynch*

May 2008 - Jan 2023

- Spearheaded lead qualification and sales funnel management strategies, achieving up to a 60% team close rate and significantly boosting RIA partnerships.
- Engineered innovative lead-generation and client acquisition strategies, resulting in enhanced client satisfaction and personalized financial planning services with client satisfaction (OSAT) reaching a sustained 99% score.
- Managed more than \$550M and retained substantial client portfolios through exemplary service and strategic financial planning, pioneering client service templates & processes to mentor advisors on improving service and retention to a firm-leading 80%.
- Achieved over 95% transition of personal practice to a major retail investment operation, fostering collaboration across departments and integrating comprehensive wealth management services.
- Successfully sourced and managed over \$45 Million in investable assets within 24 months while raising advisor program completion rates from >50% to 90% by leading and mentoring new advisors.

### EDUCATION

App Academy - Completed an intensive software development bootcamp, mastering full-stack web development.