



Contact

- 📞 +164-692-7183
- ✉️ andrew.mercer@12xwealths.org

CORE SKILLS

- Investment Strategy & Advisory
- Financial Data Analysis & Modeling
- Trading & Risk Management
- Wealth Management Solutions
- Portfolio Optimization
- Leadership & Team Management

Language

English

ANDREW D. MERCER

Lead Analyst & Trading Advisor

PROFESSIONAL SUMMARY

Results-driven Lead Analyst and Investment Adviser with over 18 years of experience in wealth management, trading strategies, and financial analytics. Expertise in developing data-driven investment strategies, optimizing portfolios, and advising clients on market trends and risk management. Strong analytical skills combined with leadership experience in high-performance financial teams.

Experience

12x Wealth Strategies – Lead Analyst & Trading Advisor 2012 – Present

- Lead development of data-driven trading strategies to maximize portfolio returns.
- Advise clients on market trends, risk management, and asset allocation.
- Manage analytics team to deliver high-quality insights and performance reporting.
- Collaborate with investment managers to design tailored wealth strategies.

AVANTAX Advisory Services – Data Analyst 2007 – 2012

- Analyzed complex financial datasets to support investment decision-making.
- Built models to track market performance and forecast investment outcomes.
- Provided analytical support for portfolio optimization and client advisory teams.
- Enhanced reporting systems for accuracy and efficiency.

Silicon Valley Bank – Junior Analyst 2005 – 2007

- Conducted financial analysis to support senior analysts and investment teams.
- Assisted with data gathering, trend identification, and client reporting.
- Supported evaluation of market conditions and credit risk for institutional clients.

EDUCATION

Bailey Dupont

SUNY Empire State College – Bachelor's Degree