

# KEVIN OTIENO OKEYO

Finance, Investment & Operations Professional | Risk, Analytics & Client Partnership

Kingston, NY | • (859) 489-1591 • otienokevin999@gmail.com

LinkedIn: [linkedin.com/in/kevin-otieno](https://www.linkedin.com/in/kevin-otieno)

## PROFESSIONAL PROFILE

Finance, investment, and operations professional with 8+ years spanning corporate finance, insurance underwriting, investment management, and client-facing service delivery, complemented by board governance and active analytical consulting. I pair rigorous analytical depth, financial modeling and valuation, FP&A, portfolio and risk analysis, with a service ethic built on proactive ownership, anticipating needs, and following through without being asked.

My background is unusual in one valuable way: I have spent my career being the dependable person clients and executives delegate to, managing a 130-account portfolio at 100% retention and building the systems and documentation that let teams scale. I hold an MSc in Finance and am a CFA Level I candidate, and I am energized by high-performing, people-first cultures that develop their talent and build systems that scale.

## WHAT I BRING TO THE ROLE

- **Proactive, can-do ownership:** A track record of anticipating problems and resolving them before they reach a desk, designing service-delivery processes, scorecards, and reconciliation controls that ran without prompting.
- **Client-centered judgment & EQ:** Sustained 100% retention across ~130 accounts by reading client needs, coordinating cross-functional stakeholders, and communicating with clarity, discretion, and professionalism.
- **Systems that scale:** Built repeatable, well-documented processes and dashboards, cost-allocation models, forecasting frameworks, NAV controls, that let leadership monitor performance and reallocate resources with confidence.
- **Analytical firepower under pressure:** Financial modeling, valuation, FP&A, portfolio analysis, and risk pricing, turning messy data into clear recommendations, with the accuracy, confidentiality, and timeliness that client and financial work demand.

## PROFESSIONAL EXPERIENCE

### University of Kentucky – Markey Cancer Center

Lexington, KY (Remote)

Data Analyst

Nov 2024 – Dec 2025

- Built interactive financial and operational dashboards with stakeholder filters, automated refreshes, and Power Query transformations, giving leadership a live view of performance to guide planning and resource allocation.
- Designed a driver-based cost-allocation model that distributed administrative expenses accurately and informed funding reallocation and staffing decisions across programs.
- Created multi-period, driver-based forecasts that sharpened visibility into future resource needs and shaped budgeting and planning.
- Partnered with program stakeholders to translate operational drivers into measurable financial outputs, the kind of cross-team partnering that keeps an organization aligned.

### University of Kentucky – Student-Managed Investment Fund

Lexington, KY

Portfolio Manager / Analyst

Aug 2024 – Dec 2025

- Delivered a 23% annual return on a \$6M co-managed equity portfolio by building integrated 3-year DCF and scenario models that drove allocation and rebalancing decisions.
- Ran monthly performance and variance analysis against benchmark indices, isolating return drivers and informing strategy.
- Designed NAV reconciliation controls and tolerance checks that improved pricing accuracy and strengthened valuation and reporting.
- Presented investment-committee materials, translating analysis into clear recommendations that drove trade approvals, communicating complex ideas to senior decision-makers.
- Mentored junior analysts, reviewing models and guiding research to lift overall quality, developing people as well as portfolios.

### Minet Kenya Insurance Brokers Ltd

Nairobi, Kenya

Senior Account Executive

Feb 2023 – Jul 2024

- Sustained 100% client retention across a ~130-account portfolio, coordinating underwriting, finance, and client stakeholders to drive timely renewals and premium collection.
- Led renewal negotiations with underwriters and structured risk placements aligned to client needs and revenue targets.
- Advised clients on insurance structures, regulatory requirements, and market developments, enabling informed risk decisions.
- Designed and rolled out service-delivery processes that lifted operational efficiency, consistency, and quality standards, building the playbook the team ran on.

- Oversaw premium collection and reconciliation, strengthening cash flow and debt management, and built underwriter scorecards to sharpen placement decisions.

### **Madison General Insurance**

*Nairobi, Kenya*

#### *Underwriting Officer*

Dec 2018 – Jan 2023

- Underwrote and authorized new business and renewals within approval limits, pricing risk to drive revenue and portfolio growth.
- Developed pricing recommendations using cohort analysis and sensitivity testing, improving risk-adjusted underwriting decisions.
- Managed the end-to-end underwriting life cycle, quotations, issuance, and renewals ensuring timely, accurate processing for clients and intermediaries.
- Coordinated across intermediaries, clients, and internal teams to resolve issues, and ensured compliance with IRA guidelines and internal standards.

### **Tax Justice Network Africa**

*Nairobi, Kenya*

#### *Finance & Administration Assistant*

Jan 2018 – Dec 2018

- Processed end-to-end payments, invoices, vouchers, approvals, ensuring accuracy and timely disbursement, and performed bank reconciliations supporting on-time month-end close.
- Tracked expenditure against budgets, supported payroll and statutory schedules, and strengthened audit readiness through organized records.

## **BOARD & LEADERSHIP**

---

### **Dr. Net Technology Labs**

#### *Board Member — Governance & Strategic Oversight*

- Provide governance and strategic oversight on organizational direction, financial sustainability, and long-term planning; lead financial modeling and forecasting to inform strategic decisions and guide systems, processes, and resource planning.

### **Goal Quest Group**

#### *Chair, Audit Committee*

- Lead oversight of financial controls, governance, and compliance; direct internal audit reviews to identify control gaps and corrective actions and advise leadership on risk mitigation and accountability frameworks.

## **INDEPENDENT CONSULTING**

---

### **Financial & Strategic Consulting Engagements**

#### *Financial Modeling & Strategic Finance Consultant*

- Build financial models, forecasts, and valuations for clients on a project basis, supporting business planning, investment evaluation, budgeting, pricing, and scenario analysis with customized reporting frameworks.

### **Handshake AI / Mercor AI**

#### *Finance & Analytical Projects Consultant (Contract)*

- Deliver contract-based analytical and finance engagements requiring structured problem-solving, quality review, and consistent accuracy across multiple concurrent deliverables in distributed teams.

## **EDUCATION**

---

### **University of Kentucky – Gatton College of Business & Economics**

*Lexington, KY*

#### *Master of Science in Finance (MSF)*

2024 – 2025

### **Kenyatta University**

*Nairobi, Kenya*

#### *Bachelor of Commerce (Actuarial Science)*

2013 – 2018

## **SKILLS & CERTIFICATIONS**

---

**Finance & Analytics:** Financial Modeling & Valuation (DCF, Scenario Analysis) • FP&A, Budgeting, Forecasting & Variance Analysis • Investment & Portfolio Analysis • Risk Analysis & Pricing

**Client & Operations:** Client Relationship Management • Stakeholder Partnering • Process Design & Documentation • Service Delivery & Continuity • Financial Controls & Compliance

**Tools:** Excel (Advanced) & Power Query • SQL • Tableau • Python

**Certifications:** FMVA (Financial Modeling & Valuation Analyst) • Bloomberg Market Concepts • Google Data Analytics • Certified Credit Professional (CCP I & II) • CFA Program Level I Candidate • CAMS Candidate • Diploma in Insurance (Ongoing)

## **REFERENCES** *Available on request.*

---