

MITZSEEN JOSEPH

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PROFESSIONAL PROFILE

Product Engineer (Full-stack) shipping web apps and automation tools from concept to deployment. Built internal tax-aware rebalancing software adopted by portfolio managers (hours → seconds; paid engagement) and shipped live consumer products (MyMangime.com, TaxRebalancer.com).

PROJECTS

Portfolio Rebalancer Tool — Tax-Aware Equity Rebalancing

Professional | Paid \$5K

Python, Streamlit, Pandas, PyInstaller

- Built rules-driven engine for tax-aware equity sleeve trades (drift constraints, embedded gains, TLH selection, wash-sale guardrails)
- Reduced rebalance time from hours to seconds; shipped Streamlit UI + one-click executable (PyInstaller) for non-technical PMs
- Standardized workflow into repeatable, auditable outputs (trade list + diagnostics) aligned to CIO-defined constraints

TaxRebalancer.com — Self-Serve Portfolio Analysis Tool

Live

React, TypeScript, Firebase, Cloud Functions

- Built consumer tax analysis tool with signed URL upload flow for statement ingestion (PDF/Excel) and parsing pipeline
- Implemented tax-aware sell-sequencing logic (ST/LT classification, netting/cross-offset) to surface harvest opportunities

MyMangime.com — Anime/Manga Discovery Platform

Live

React, TypeScript, FastAPI, PostgreSQL, Redis

- Built full-stack discovery + tracking platform with multi-source enrichment (AniList/Kitsu/MAL) and entity resolution
- Designed 300+ tag taxonomy and guided quiz mapping user preferences to weighted recommendations

Budget_my — Personal Finance Scenario Planner

Personal

Python, Streamlit, Pydantic

- Built budgeting + what-if tool with paycheck scheduling and scenario modeling (debt payoff, TVM calculations) in Streamlit

EXPERIENCE

TechSavvy — SaaS Consulting & Development

Philadelphia, PA

Founder & Lead Engineer

2023 – Present

- Generated \$20K in services revenue delivering portfolio automation deployments across multiple wealth management firms
- Tutored students for AP Computer Science A (Java) and AP Computer Science Principles (JavaScript)

Northwestern Mutual

King of Prussia, PA

Wealth Management Associate

February 2024 – Present

- Built Python/Excel automation tools to streamline workflows across account reconciliation and reporting
- Partnered with advisors to translate requirements into tooling that reduced manual work and improved data accuracy
- Supported \$1B+ in client assets across 500+ HNW families; domain expertise in tax-aware trading and compliance

SKILLS

Engineering: React, TypeScript, Next.js, Python, FastAPI, PostgreSQL, Firebase, Streamlit, Git, REST

Product: End-to-end ownership, UX tradeoffs, performance tuning, API integration

Domain: Tax-aware trading constraints, portfolio rebalancing, brokerage ops/compliance

Credentials: Series 7, Series 63, SIE, PA Life & Health Insurance, CFP® Candidate

EDUCATION

University of Pennsylvania

Philadelphia, PA

BA Philosophy, Minor in Computer Science | August 2019 – December 2023

D1 Football Athlete • Wharton Leadership Academy (Team Director) • National Society of Black Engineers • Be The Match