

Max Kelley

AI Automation & Operations Specialist · Finance + Compliance Background

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PROFESSIONAL SUMMARY

AI-era operator and finance-trained builder. Ship production AI systems by directing AI development tools (Claude Code, Cursor, n8n, VAPI, Anthropic Agent SDK) rather than writing code from scratch - the shipped product, not the keystrokes, is the qualification. Founder of an AI/marketing agency with active website clients and recurring AI service customers. Concurrent loan officer with active sales pipeline. Combines deep hands-on experience in modern AI tooling with finance, compliance, and consultative client work.

CORE COMPETENCIES

- **AI & Automation:** Anthropic Agent SDK, Claude Code, multi-agent pipelines, voice AI agents (VAPI), workflow automation (n8n), prompt engineering, AI-powered content/outreach
- **Tech Stack (power user / product owner):** Supabase, Vercel, Next.js / React, Twilio, Stripe, Resend, HubSpot, Total Expert, Instantly AI, Apify, Canva
- **Marketing & Growth:** Google Ads management, technical and content SEO, cold email infrastructure, lead generation funnels
- **CRM Operations:** Total Expert (mortgage CRM SME), HubSpot, email campaign design, automated workflows, CRM data hygiene
- **Compliance:** TCPA, mortgage regulations (NMLS-licensed LO), consent management, call frequency rules
- **Finance & Sales:** Active mortgage loan originator with consistent monthly closings; consultative B2B sales; client-facing relationship management

PROFESSIONAL EXPERIENCE

NewFed Mortgage

Reading, MA

September 2023 - Present

AI & Automation Specialist (January 2025 - Present)

- Identify cross-departmental inefficiencies and design AI/automation tools to streamline mortgage operations; partner with sales, ops, and compliance stakeholders
- **Designed and built MVP of Orign8** - an internal AI-powered borrower retention calling platform (VAPI, Node.js, React, PostgreSQL, Twilio) with TCPA compliance engine, call queue logic, cost controls, and appointment booking. Project paused pre-incorporation.
- Designed compliance engine covering abandoned-call-rate logic, call frequency limits, timezone-aware business hours, and state-by-state regulatory rules
- Built and shipped revenue calculators and email campaign generator on NewFed's main site (live)
- Designed and built C21 Dotloop bridge (Next.js + Supabase + Vercel) for Century 21 transaction integration - deploying
- Designed and built NFM social media content generator (Next.js + React) for loan officer use - deploying
- Built customer journey/campaign builder supporting LO outreach automation

Loan Officer (September 2023 - Present, concurrent)

- Active mortgage loan originator with self-prospected pipeline plus referral partners; **closed \$2.3M YTD with \$3.2M projected by end of June 2026**
- Hold active NMLS Mortgage Loan Originator license
- Build long-term client relationships through consultative needs assessment and clear communication of complex financial products

CRM Operations (September 2023 - December 2024)

- Managed Total Expert CRM for an 80+ loan officer organization - campaign configuration, workflow design, troubleshooting, data hygiene
- Built and managed automated email campaigns and alert workflows integrating Total Expert with Altter for equity alerts, rate triggers, and credit inquiries
- Partnered with the compliance team on TCPA requirements for outbound communications and consent capture strategies
- Direct hire by EVP of Sales; deep mortgage industry exposure through hands-on mentorship

Elev8 Growth Solutions - Founder & Operator

Remote / MA

May 2024 - Present

Founded and operate a multi-client AI/marketing agency. Active website clients and recurring AI service customers across trades, real estate, education, and property management.

- **Designed and shipped Blog Agent** - a multi-agent content pipeline running on cron, using Anthropic Agent SDK, Supabase, Vercel serverless functions, and Resend. Research agent surfaces ICP pain points; generation agent drafts SEO-optimized blog posts; admin dashboard handles approval/deny via one-click email tokens; approved posts auto-publish to client CMS. Deployed for paying recurring clients.
- **Drove avg Google ranking from 30.9 → 12.5 in 2.5 months** for a trash removal client - full SEO campaign covering keyword strategy, content production, and technical SEO
- **Generated 95+ Google Ads conversions over 18 months** managing end-to-end campaigns - keyword research, negative keyword optimization, ad group restructuring, performance reporting
- Designed and shipped client websites on a modern stack (Next.js / React / Vite, Tailwind, shadcn/ui, Supabase, Vercel, Stripe, Resend) for: mytrashking.com, RJL Electric, Scott PHS, Top Spot Mastermind, Four Seasons (in design), NECEC (full e-commerce + admin panel rebuild - completing)
- Built elev8growth.solutions - Elev8's company site
- Designed personalized AI outreach systems using n8n + Apify + Gemini API + Instantly AI for automated cold email campaigns with dynamic personalization at scale
- Direct owner relationships with all clients - informal sales motion, formal service agreements, Stripe billing, project delivery

Top Spot Mastermind - Co-Founder

Chelmsford, MA

~2023 - Present

- Co-founded ~20-member networking and mastermind group with realtor Danny O'Connell Jr.; meets monthly
- Help run meetings and member operations; the group has generated multiple Elev8 client engagements

Varsity Lacrosse Coach - Dracut High School

Dracut, MA

March 2021 - Present

- Design and deliver training programs for student athletes; demonstrates ability to teach complex concepts to varied skill levels

EDUCATION & CREDENTIALS

Bachelor of Science, Finance - Southern New Hampshire University, May 2025

NMLS Licensed Mortgage Loan Originator (active; flexible on retention for the right opportunity)

SELECTED PORTFOLIO

[elev8growth.solutions](#) - Elev8 company site (built by Max)

[mytrashking.com](#) - trash removal client (SEO ranking 30.9 → 12.5 in 2.5 months)

[topspotmastermind.com](#) - Top Spot Mastermind networking group

RJL Electric, Scott PHS - additional live client sites