

SUMMARY

Senior Business Analyst and PMP-certified Project Manager with business and technology experience with Prime Brokerage reporting, middle and back office trade flows, agile methodology, and operational processes.

SKILLS

Management	Lean Agile; Waterfall; product development; complex document management
Subject Matter	Prime brokerage; hedge fund accounting; trade capture; Fixed Income products
Technical	SQL queries; Perl, Python, and UNIX scripting; Excel macros; Java; Angular
Software	JIRA; Advent Axys; Balsamiq; Microsoft Office; Datawatch Monarch; SWIFT

EXPERIENCE

Bank of America Merrill Lynch – New York, NY **Apr 2017-Present**
Senior Project Manager, Business Analyst, Agile Product Owner

Project manager and business analyst, responsible for certain client-facing Prime Brokerage reporting.

- Manages yearlong effort to migrate reports and extracts deliveries to international clients from legacy to strategic platform.
- Works closely with global client onboarding and integration, client service, account management, product management, and technology teams, and with key clients.
- Leads all aspects of migration prep, execution, escalation, and communication.
- Agile product owner for development of internal- and client-facing on-demand position and activity query application with consolidated, multi-asset-class capability.

Independent PM/BA Consultant **Jan 2016-Mar 2017**

Consulted on short term projects for remote global customers.

CCG Advisors – San Diego, CA

Analyzed operational processes and collected requirements related to quarterly client billing process. Created baselined project plan, developed optimized process, and operational run book.

Major Healthcare Products and Services Distributor – Spartanburg, SC

Authored detailed RFP for a data analysis platform with BI, ETL, and EDW components. Performed all related analysis, including legacy and future state system, competitor, and market. Interviewed prospective bidders.

MiQare, Inc. – Toronto, BC

Worked with bidder's SMEs to develop responses to government-issued RFP for nationwide data delivery and inventory management platform.

Varsanic Traders, Inc. – London, UK

Created complete PMP training material for PMP R.E.P.-certified educational organization.

Citco Fund Services (USA), Inc. – Jersey City, NJ **Sep 2008-Sep 2015**
Senior Project Manager, Business Analyst

Responsible for all project management and business analysis related to trade capture and data extracts.

- Analyzed Risk Metrics positions specs to define requirements for multi-asset class RM3D-format risk file
- Managed migration of legacy client-facing data extracts to latest version.
- Managed project to automatically load broker statements to internal reconciliation platform.

Timothy Reed, PMP
treed@timothyreed.com

- Responsible for migration of trade capture and extracts, in coordination with a firmwide Sybase to Oracle books and records database conversion.
- Developed Excel-based tools to automate extract regression testing, resulting in 80% fewer bug-fixes.
- Involved with new client on-boarding, including responding to RFPs and trade file testing.

Lehman Brothers – New York, NY

Jun 2007-Sep 2008

Product Manager (Vice President)

Responsible for client-facing web applications, including trade capture, wire transfers, standing settlement instructions, cash wires, on-demand reporting, and customizable landing pages.

- Managed the design and implementation of user-customizable client portal home page.
- Created BRDs, wireframes, and use cases related to client portal, SSI, and cash wires functionality.
- Worked with business leaders, IT staff, other analysts and product managers, and external designer.
- Coordinated resolution of longstanding client-specific issues to improve relationships with key clients.

UBS Securities LLC – New York, NY

Jan 2003-Jun 2007

Product Manager (Director)

2003-2007

Business Analyst (Consultant)

2003

Managed development for Fixed Income Prime Broker middle and back office platform.

- Managed development of Fixed Income PB trade capture, settlement, and consolidated cross-product reporting platform, with interfaces to back office settlement systems (ADP, FOS, Martini, Excalibur)
- Worked with internal and external stakeholders to define data extracts for third parties.
- Involved with the integration of Advent Axys, Geneva portfolio management systems
- Defined consolidated fixed income, listed derivatives, FX, repo financing, swaps, equities position, cash flow, and P&L reports.

Experience prior to 2003

Credit Suisse – New York, NY

Prime Broker Development Manager (Consultant)

JP Morgan – New York, NY

Senior UNIX Systems Engineer/Administrator

Credit Suisse – Tokyo, Japan

Front Office Trading Systems Manager

CERTIFICATIONS

Project Management Professional (PMP), Project Management Institute

TRAINING/EDUCATION

SDM SAFe Product Owner-Product Manager (PMPO)

SDM Lean – Agile for Teams

Fundamentals of Product Management, Sequent Learning Networks

Advanced MS Project Workshop, Project Management Institute NYC Chapter

Undergraduate work at School of Visual Arts, New York, NY