

## 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

<b>Management</b>	<b>Project management; product management; business analysis; data analysis; process improvement; complex document management; Lean Agile</b>
<b>Industry</b>	<b>Prime brokerage; hedge fund accounting; middle and back office services; position reporting; trade capture; repo financing; FX; Swaps; other Fixed Income products</b>
<b>Technical</b>	<b>SQL queries; Perl and UNIX scripting; CSS; familiar with C++, Java</b>
<b>Software</b>	<b>JIRA; Advent Axys; Advent Geneva; Balsamiq; Citco Aexeo; Microsoft Office; SharePoint; Datawatch Monarch; familiar with SWIFT message types, Bloomberg symbols</b>

## EXPERIENCE

**Bank of America Merrill Lynch – New York, NY**

**Mar 2017-Present**

***Senior Project Manager, Business Analyst, Agile Product Owner***

Project manager and business analyst with the Feature Management team, responsible for working with product development on client-facing Prime Brokerage services and applications.

- Managed yearlong effort to migrate reports and extracts deliveries to international clients from legacy to strategic platform.
- Worked closely with global client onboarding and integration, client service, account management, product management, and technology teams, and with key clients.
- Hands on leadership of all aspects of bi-weekly migration prep, execution, and escalation.
- Served as agile product owner for development of internal- and client-facing on-demand position and activity query application with multi-year roadmap.
- Worked with product development manager to include cross-product support, making the resulting application the firm's first PB reporting tool with multi-asset-class capability.
- Performed analysis, define epics and features, created stories and acceptance criteria, refined backlog, assisted team to improve team ceremonies, and performed product demos.

**Independent PM/BA Consultant**

**Jan 2016-Mar 2017**

**CCG Advisors – San Diego, CA**

***Project Manager, Business Analyst***

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

**Major Healthcare Products and Services Distributor – Spartanburg, SC**

***Business Analyst***

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**

***Business Analyst***

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**

***PMP Training Specialist/Producer***

Created complete PMP training syllabus and supporting 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 (Vice President 2008-2012, Consultant 2012-2015)***

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

- Created project charter, BRDs, technical specs, metrics, and other documents related to planning, executing, and monitoring the migration of the firm's accounting platform from Sybase to Oracle.
- Participated in or managed daily scrums, client calls, planning meetings, and issue escalation/resolution.
- Wrote and managed client-facing extract documentation. Improved accuracy by using data analysis techniques to reconcile application and extract data against data definitions.
- Created, updated, and tracked all software issues and status, including bugs, questions, and feature requests using JIRA and ad-hoc JQL filters. Managed all issue-related communication with developers through the platform.
- Defined testing criteria and wrote Excel macros to automate regression testing, resulting in 80% fewer bug fix releases.
- Performed impact analysis of accounting platform changes on trade capture and extracts by defining test cases, processing test trade activity, reading IT technical specs, and analyzing Java source code.
- Analyzed Risk Metrics positions specs to define requirements for RM3D-format risk file, covering ~50 Fixed Income, Swaps Derivatives, and Equity instruments. Assisted IT and clients with validating changes.
- Analyzed trade confirms to identify which data elements were required by Citco's reconciliation system. Used Datawatch Monarch to extract those fields and convert to CSV for loading. Created SQL queries and heat maps to identify which security types to prioritize based on volume.
- Worked with a global seven-person project manager/analyst team. Defined and implemented processes to ensure that testing and analysis progressed seamlessly during the 24-hour global day.
- Responsible for production of production-release-related client communication, including development of release documentation derived from JIRA-managed release notes.
- Involved with new business and 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)***

***2004-2007***

***Program Manager (Director)***

***2003-2004***

***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**

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

**EDUCATION**

Trinity School, New York, NY

School of Visual Arts, New York, NY