# SUMMARY

* Senior PMP-certified **Operations Manager, Business Analyst,** and **Agile Product Owner** with a strong technical background and extensive experience with **Prime Brokerage** reporting, operational flows, and client on-boarding.
* Comfortable working with operations, development, support, and clients.

Capabilities:

Management - Lean Agile, Waterfall, product development, and platform migrations

Subject Matter - Prime Brokerage, Hedge Fund Accounting, Trade Capture; fixed income and crypto-currencies

Technical - SQL, Perl, Python, and UNIX scripting; Excel and Google Sheets macros; RESTful API endpoint queries

Software – JIRA, Advent Axys, Balsamiq, Microsoft Office, Datawatch Monarch, and SWIFT

# CERTIFICATION

* 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

# PROFESSIONAL EXPERIENCE

BitGo Inc. – New York, NY June 2019 – Present

Business Manager

**Project Description/Scope:** Manager responsible for the development and operation of systems and procedures to support institutional crypto lending, settlement, and trading.

Responsibilities/Deliverables:

* Served dual roles as operations lead responsible for managing lending and launching trading; and product manager tasked with defining tactical and strategic product requirements for lending.
* Defined and executed lending and trading operations procedures. Trained service and support staff and ensured proper handover.
* Coordinated activities of client service, sales, risk, operations, support, development, and third-party service providers.
* Created business management tools, including client-facing daily and internal reporting, success metrics, and dashboards.
* Assisted the business owner, sales, compliance, and service teams with managing all aspect of the business process, including on-boarding, KYC/AML, deal originations and terminations, settlement, billing, funding, and staffing.
* Functioned as the client-facing and internal escalation contact for settlement-related business issues.
* Managed a two-person client service team.

Bank of America, Equity Services Technology – New York, NY Apr 2017 – Mar 2019

Senior Business Analyst/Project Manager/Agile Product Owner

**Project Description/Scope:** Project Manager responsible for migrating the delivery of ~100K PB and Broker Dealer daily reports to a strategic platform.

Responsibilities/Deliverables:

* Worked with stakeholders to develop a project charter, business requirements, and project plan, in order to refactor work estimates, schedule, and important milestones.
* Worked directly with account service team, client on-boarding, and key clients to agree on testing criteria, review results, and ensure no post-migration impact on service levels.

**Project Description/Scope:** Agile Product Owner responsible for developing a web-based activity and position data on-demand query tool with consolidated, multi-asset-class capabilities.

Responsibilities/Deliverables:

* Worked with business sponsor to analyze business needs, perform competitive analysis, and develop vision statement.
* Created dashboard and Kanban in JIRA, developed themes, epics, features, stories and acceptance criteria, and populated the backlog.
* Participated in all ceremonies, including sprint planning, retrospective, daily stand-ups.

**Project Description/Scope:** Business Analyst on a multi-year project to migrate the bank’s PB books and records, and related clearing and settlement flows, from a legacy to modern platform.

Responsibilities/Deliverables:

* Met with stakeholders and documented current process for managing daily client billing and trade figuration, including rules for calculating credit and debit interest spreads and stock loan fee rebates.

Freelance Jan 2016 – Mar 2017

Project Manager/Business Analyst

**Project Description/Scope:** Consulted on short term projects for remote global customers.

Responsibilities/Deliverables:

* Developed an operational run book to manage a complex quarterly client billing process..
* Authored detailed RFP for a data analysis platform with BI, ETL, and EDW components.
* Worked with bidder’s SMEs to develop responses to government-issued RFP for nationwide data delivery and inventory management platform.
* 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

Connectivity Manager/VP

**Project Description/Scope:** Responsible for project management and business analysis related to trade capture and data extracts.

Lehman Brothers – New York, NY Jun 2007 – Sep 2008

Fixed Income Prime Broker Product Manager/VP

**Project Description/Scope:** Responsible for client-facing web applications, including trade capture, wire transfers, standing settlement instructions, cash wires, on-demand reporting, and customizable landing pages. Also worked with client service to resolve certain client-facing issues.

UBS Securities LLC – New York, NY Jun 2003 – Jun 2007

Fixed Income Prime Broker Product Manager/Director 2005 – 2007

Business Analyst 2003 – 2005

**Project Description/Scope:** Managed development of the trade capture and client reporting software platform for Fixed Income Prime Broker middle and back office.

Credit Suisse – New York, NY

Prime Broker Development Manager

JP Morgan – New York, NY

Senior UNIX Systems Engineer/Administrator

Credit Suisse – Tokyo, Japan

Front Office Trading Systems Manager

Objective Technologies – New York, NY

Founder/Technology Startup

# EDUCATION

* Undergraduate studies, School of Visual Arts, New York, NY