

**Timothy Reed**  
**Business Manager**  
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## **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 cryptocurrencies  
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**  
**Business Manager**

**June 2019 - Present**

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

**Apr 2017 – Mar 2019**

**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**  
**Project Manager/Business Analyst**

**Jan 2016 – Mar 2017**

**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**  
**Connectivity Manager/VP**

**Sep 2008 – Sep 2015**

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

**Lehman Brothers – New York, NY**  
**Fixed Income Prime Broker Product Manager/VP**

**Jun 2007 – Sep 2008**

**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**  
**Fixed Income Prime Broker Product Manager/Director**  
**Business Analyst**

**Jun 2003 – Jun 2007**  
**2005 – 2007**  
**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