Brant Harry

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**Senior Project Manager / Program Manager / Business Analyst**  
Industry Focus: Financial Services, Technology, Banking & Investment Management

**Education, Licenses, Projects & Certifications**

**Bachelor of Science, Finance & Accounting** | University at Buffalo, State University at New York

Certified **Capital Markets Knowledge—FX, FICC, Commodities & Equities** (Bloomberg: 2017); Certified **Applied Data Science with Python Specialization** (University of Michigan: 2019); Certified **Project Management & Full Stack Development** (Free Code Camp 2019); **Project 2019** - Quantitative Trading Model - Equities & Options

**Key Skills, Qualifications & Technologies**

MS Office (Word, Excel, PowerPoint, Visio) | Reuters Eikon & Westlaw | Bloomberg Terminal | Oracle 11g | Hyperion Essbase | Charles River (OEMS) | Murex MarketAccess| TriOptima (TriReduce, TriResolve, TriCalculate, TriBalance) | Oasys TradeMatch | Murex MarketAccess | Swift | Salesforce | SQL | Python Quandl Pyplot Tkinter Pandas Numpy Sklearn | Java | JavaScript | HTML | CSS | Node, Angular & React.js | Git, Github | Unix/Powershell | VBA/.Net | Kdb+/Q

**Portfolio Management**

Traded personal portfolio using a mixture of ETF, Futures and Options with positions gaining 128%+ Adj Gain and 13%+ for overall portfolio

Quant analysis spanning Equity, Fixed Income and Commodities spaces with functional design based on structuring trades and executing positions according to valuations based on quantitative models in Excel and Python

**2015 - Present**

**Professional Experience**

Insight Global - Franklin Templeton  **| Sr. Program Management Consultant Seattle, WA & New York, NY: 2019 - Present**

*Provide technology and data analysis consulting services related to Investment Management, Risk, Trading, Legal, Marketing, Compliance, Tax and Valuation issues — critical to helping Fiduciary Trust and Franklin Templeton Investments develop and launch a revolutionary new customer-facing Client Services Portal (CRM) Web/Mobile*

* Develop strategy/validation for future projects using a mix of cutting-edge financial/business analysis tools and technologies
* Led project for CEO/COO providing accounting support and designing new data models that led to multi-million-dollar tax savings
* Structure client testing activities, creating automated confluence tools using Visual Basic and SharePoint, and quarterbacked calls aimed at improving relationships between divisions and supporting implementation of a full client-facing portal for Fund Managers
* Applied statistical analysis and data mining (SQL/VBA/XML) skills to identify and resolve product, process and reporting challenges
* Define and document various business unit processes and client behavior using Visio Flowcharts, Statistical Analysis BRDs and BI graphs
* Define roadmap segments for multiple business units including tracking, budget and Confluence/JIRA project monitoring presentations
* Identified trade-lifecycle improvements and processes with Charles River booking system
* Presented solution for statistical analysis using MANOVA to team solving process and product issues during 30,90 and 360 day timelines

Converge One - Morgan Stanley  **| Senior Consultant, Project & Product Management New York, NY: 2018 - 2019**

*Leading project management within Risk, Compliance and Legal Departments and traveling to implement strategies with business leaders*

* Developed strategy for clients, aligned with their business needs, and managed project lifecycles via technical calls with internal and external (Thomson Reuters and Mark-logic) vendors from inception to closure—using AGILE/SCRUM methodologies and reporting to COO
* Managed Agile methodology for JIRA authoring — including Epic, Story and Task creation — to convey user experience and transfer System Data Structure through IBM Cognos for the Risk and Compliance suite
* Drafted business requirements and product specifications for systems requiring complex legal terminology, risk reporting systems and business regulatory tools that capture information using natural language processing (NLP)

Citi **| Senior Business Analyst New York, NY: 2014 - 2018**

*Managed a fast-paced mix of Trading Desk & Financial system development activities in a cross-asset product pool that included Options/Derivatives Valuation & Swaps, as well as Rates Fixed Income products; scope of control spanned teams of up to 25 cross-functional employees*

* Participated in analytical regulatory client query coverage for complex fund structures such as UCITS over North America, EMEA, LATAM, and APAC regions such as pension funds, insurance companies, hedge funds and asset managers
* Managed a team in development of Options Valuation updates for the Pricer component within Equities and FX Trading Platforms for Cross Currency, FX Back to Back Hedging and Agency Best Execution
* Analyzed/compiled requirements and added value to the firm by leading a cross-asset ledger migration project, involving multiple international offices, creating improvements that saved $300M+ on average from ledger to balance sheet
* Took on additional responsibility for Prime Brokerage support for P&L attribution on client-facing booking platforms for T+0 trades dependent on order exchange routing
* Improved internal messaging linkages with OMS systems involving Oasys, eDealer, Murex, Calypso, Openlink, FOX, Charles River, Bloomberg (TOMS), Tradeweb and internally compiled prime brokerage platforms/interbank platforms I.e. CitiFX, CLS FX, PBX(Private Branch Exchange aka Turret/Voice, Goldman/JPM Platforms)
* Built, automated and executed trade booking improvements for FX and Equity hedging involving back to back trades, regulatory, business requirements, manuals, algorithms and pricing controls/reporting using MS SQL Server/Oracle, MS Access, FIX Protocol, FpML and Python

Bank of America | **Relationship Manager II New York, NY: 2012 - 2014**

*Presented solutions to senior management, recommending phased implementations to curb inefficient practices and support sales growth*

* Managed and originated a $130M+ portfolio of FHA, HELOC and Conventional mortgages with an average value of $500,000
* Leveraged automation methods (Salesforce, Apex Code/SOQL dashboards) to reduce effort from the sales team in terms of documenting client engagements and running client marketing analyses; efforts included defining new changes/connections to AS400 data fields

HSBC Bank USA, N.A. **| Compliance Specialist New York, NY: 2011 - 2012**

*Interacted with foreign/domestic clients in French and other languages to ensure adherence with regulatory compliance guidelines*

* Designed a new audit control method to solve account integrity issues given a large degree of decision-making responsibility
* Improved on follow-up process by creating a tool to reallocate and prioritize client outreach, increasing team overall productivity 12.5%