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Project manager passionate about transforming the fintech space and democratizing financial services

## EXPERIENCE

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### Tech/FinTech

#### ESSENTION

##### *Project Manager*

- Managed remote based development team for the city of San Francisco from business/data analysis to production release prioritizing user experience and business requirements
- Worked with tech lead to develop work breakdown structure, project roadmaps, status, remove roadblocks, manage backlog, set sprint priorities
- Led executive meeting to give status, ensure business goal alignment
- Developed processes to increase billing accuracy & simplify reporting resulting in a 60% reduction in management hours spent on invoicing.
- Led internal project to enhance security measures around identity management, email, file sharing to ensure compliance with the cities elevated vendor standards.

**San Francisco, CA**

Jan '20 - Present

#### GROVE ADVISORS

##### *Voice of the Customer/Financial Planner*

- Collaborated with the product owner to help realize the product vision/roadmap & provide insight into the client experience resulting in an over 80% NPS score.
- Helped support A/B and multivariate testing (varying client onboarding and advisor servicing processes) resulting in a reduction in plan building time by 2 hours per plan.
- Created a scalable service model to allow for increased automation of the planning process—expected to cut plan time in half once implemented.
- Supported onboarding & planning for 300+ clients analyzing & addressing their debt management, savings, investing, retirement, & insurance planning goals.

**San Francisco, CA**

Feb '19 - August '19

### Financial Services

#### FIDELITY INVESTMENTS

##### *Financial Advisor*

- Helped my team build customer experience strategies, data-driven prospecting processes, & KPIs to become one of the top 20% of Fidelity Advisors nationwide.
- Facilitated 25+ branch seminars and developed processes to capture best practices.
- Developed over 200 financial plans for clients with \$100k - \$1m+ in assets through a wide range of products and services including but not limited to investment, retirement, & income planning.

**Pasadena, CA**

July '14 - June '18

### Personal Projects

#### Finance Your Dreams

##### *Founder*

- Conducted market research to develop target audience personas, user stories, and prioritize backlog.
- Used hypothesis-driven problem solving to identify the best way to marry site goals with target audience needs and draft wireframes to determine the optimal site UX.
- Ran surveys and interviews to gather prospective user feedback on MVP.
- Created copy, ran branding & social media, and measured results in Google Analytics.

**Multiple**

Oct '17 - Feb '19

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#### EDUCATION

University of Notre Dame, 2014  
*Bachelor of Arts, Economics | Math*

#### Technologies

Azure DevOps, MS Office, Google Suite, JIRA, JS, HTML, CSS, SQL, BootStrap, ASP.Net, C#, Python, Ruby

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