

MARCELO LORENZETTI

EXECUTIVE AI LEADER

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15+ YEARS ENTERPRISE AI ARCHITECTURE | DRIVING AGENTIC GENAI TRANSFORMATION IN FINANCIAL SERVICES

30+ years of pioneering agentic GenAI applications, enterprise AI architecture, and financial technology innovation across global investment banking and Fortune 500 environments. Proven track record of driving technological advancement, operational excellence, and cross-functional collaboration in complex regulatory environments.

KEY STRATEGIC CAPABILITIES:

Agentic GenAI Applications & LLM Integration | Enterprise AI Architecture & Cloud Transformation | Python-Based Software Engineering Leadership | Investment Banking Technology Strategy | DevOps & CI/CD Pipeline Excellence | Regulatory Compliance

TECHNICAL EXPERTISE:

AI/ML Platforms: OpenAI, AWS Bedrock, Microsoft Copilot, LLMs, NLP, Agentic AI Frameworks | **Programming:** Python, Java, SQL, JavaScript, Shell Scripting | **Cloud & DevOps:** AWS, Azure, GCP, Docker, Kubernetes, GitHub Actions, CI/CD Pipelines | **Enterprise Systems:** SAP, PeopleSoft, Oracle Fusion Middleware, WebLogic, Documentum | **Security:** IAM, RBAC, TLS 1.3, Encryption, MFA, Regulatory Compliance Frameworks

CORE COMPETENCIES

Agentic GenAI Applications | Large Language Models (LLMs) | Python & Software Engineering | Enterprise AI Architecture | Investment Banking Technology | Cloud Platforms (AWS, Azure, GCP) | Containerization (Docker, Kubernetes) | Technical Leadership | DevOps & CI/CD Pipelines | Cybersecurity & Compliance | Financial Technology Innovation | Communication

PROFESSIONAL EXPERIENCE

SavvyLex, New York, NY

Kun 2025 –Present

CIAO and AI Product Manager

COMPANY OVERVIEW: SavvyLex is a legal technology venture pioneering ethical AI solutions for regulated environments. Its flagship platforms—SkillBuilder, Vera, and LexAgents—equip legal professionals with intelligent tools for learning, reasoning, and automation.

IMPACT SNAPSHOT: Visionary founder leading the design and deployment of agentic AI systems tailored for legal workflows. Architected modular, cloud-native platforms that integrate LLMs, secure data pipelines, and compliance-first automation across legal education, billing, and operations.

- **Launched SkillBuilder**, an AI-powered learning platform delivering scenario-based legal training, doctrinal simulations, and personalized feedback across mobile and desktop environments.
- **Engineered Vera**, a secure, explainable AI reasoning engine for legal document analysis and citation hygiene, enabling law firms to adopt GenAI with confidence and auditability.
- **Developed LexAgents**, modular autonomous agents for legal billing, intake triage, and compliance workflows—integrated with Microsoft Copilot, Azure OpenAI, and AWS Bedrock.
- **Reduced onboarding and billing cycle times by 40%** through intelligent automation and structured data extraction from unstructured legal documents.
- **Designed investor-ready ROI models and scenario-based demos**, accelerating adoption among physician groups and legal service providers.

Lazard Freres, New York, NY

Feb 2010 – Jun-2025

IT Director

COMPANY OVERVIEW: Global financial advisory and asset management firm providing strategic counsel across investment banking and capital markets.

IMPACT SNAPSHOT: Strategic technology executive leading enterprise-wide digital transformation and AI innovation initiatives. Architect enterprise cloud-native frameworks and secure GenAI applications serving global financial operations.

- **Pioneered enterprise-safe VERA AI Agentic Framework enabling organization-wide GenAI deployment** across legal, HR, and finance departments while achieving full InfoSec approval through advanced encryption and access control architecture.
- **Led architecture and enterprise-wide adoption of Cloud-Native Development Framework (CDF)**, now serving as standard for 50+ mission-critical applications, achieving 99.9% uptime and 50% faster deployment cycles.
- **Delivered 30% operational cost reduction** through strategic consolidation of legacy infrastructure into modern cloud-native services across Azure and AWS platforms with containerized deployments.
- **Architected secure AI integrations using Python-based software engineering** to connect Microsoft Copilot, OpenAI APIs,

and AWS Bedrock with internally hosted LLMs, establishing technical leadership in agentic GenAI applications.

- **Implemented advanced NLP models for intelligent document classification**, improving processing efficiency by 20% while developing custom OCR automation, reducing manual data entry by 80%.

Verizon Wireless, Basking Ridge, NJ
Senior Solutions Architect

Feb 2009 – Feb 2010

COMPANY OVERVIEW: Global telecommunications leader providing enterprise and consumer connectivity solutions.

IMPACT SNAPSHOT: Delivered secure WebLogic Portal solution featuring 100+ custom portlets for enterprise knowledge management, enabling content access beyond DMZ.

- **Implemented CenterStage Pro** and federated search to support advanced collaboration.

EMC², New York, NY
Senior Solutions Architect

Nov 2007 – Feb 2009

COMPANY OVERVIEW: Enterprise information infrastructure technology leader providing storage, security, and content management solutions.

IMPACT SNAPSHOT: Architected enterprise content and portal solutions for Fortune 500 financial services clients, including Pfizer, JPMorgan Chase, and Johnson & Johnson, delivering scalable content management platforms across global operations, digital marketing, and marketing/sales operations. Managed 6 directors/managers and 32 indirect reports.

- **Led cross-continental deployments spanning Argentina, Brazil, Japan, India, and the Netherlands**, ensuring consistent platform performance and regulatory compliance across diverse international markets.

JPMorgan Chase & Co., New York, NY
Sr. Solution Architect - Consultant

Oct 2006 – Nov 2007

COMPANY OVERVIEW: Global investment banking and financial services leader providing comprehensive capital markets solutions.

IMPACT SNAPSHOT: Enhanced performance of heavily customized DealWorks WebTop application through advanced Documentum platform optimization, delivering improved efficiency for investment banking deal management workflows.

- **Developed proof of concept environment for Documentum and Captiva integration**, enabling automated document processing capabilities for enterprise content management initiatives.

Citigroup, New York, NY
Sr. Architect/Developer (AVP)

Apr 2003 – Oct 2006

COMPANY OVERVIEW: Global financial services corporation providing investment banking, consumer banking, and wealth management.

IMPACT SNAPSHOT: Led enterprise content management application development projects aligned with global financial operations, delivering scalable solutions while performing design validation for cross-functional groups.

- **Established custom UAT/Production migration processes** and served as key technical leader for Documentum, WebSphere, and WebLogic platforms supporting mission-critical financial applications.
- **Architected solutions spanning Oracle, Interwoven, and SiteMinder technologies**, ensuring seamless integration across Windows, AIX, and Solaris environments for international banking operations.

EARLY CAREER HIGHLIGHTS

Mphasis, Miami/Los Angeles/Amsterdam/Tokyo/New York
ECMS Senior Software Engineer

Sep 1999 – Apr 2003

Flex Informatic Ltd, Rio de Janeiro/São Paulo, Brazil
Senior Solution Architect/Developer

Apr 1990 – Sep 1999

IBMEC - Brazilian Institute of Capital Markets, Rio de Janeiro, Brazil
Senior Software Engineer

Feb 1987 – Apr 1990

EDUCATION

Master's Degree, Computer Systems – **Emphasis in Technology Management** | City University of Seattle | 2009 – 2012
Bachelor of Science, Computer Science | FAC – Rio de Janeiro, Brazil | 1988-1991
Certification: AI & Machine Learning for Data Science and Cybersecurity | Massachusetts Institute of Technology (MIT) | Dec 2025
EXECUTIVE AI & MACHINE LEARNING LEADERSHIP
Harvard University: Data Science and Machine Learning • **Columbia University:** Essential Math for AI • **IBM:** GenAI for Executives & Business Leaders • **AWS:** Machine Learning, AI/Ops, CI/CD for GenAI Applications

CLOUD & ENTERPRISE TECHNOLOGY

AWS: Cloud Practitioner, Designing Data Lakes | IBM: Data Engineering & Machine Learning, Data Warehousing & BI Analytics

Microsoft: AI Agents in GitHub Copilot | Agile & Scrum Fundamentals

CYBERSECURITY & COMPLIANCE

IBM: Cyber Defense Architecture, Penetration Testing, Threat Hunting, Cybersecurity Compliance Framework | CMMI Level 5 Project Experience

STRATEGIC INITIATIVES

SavvyLex AI Education Platform – Founder & AI Strategy Leader

2023 – Present

AI education platform democratizing responsible GenAI adoption within the legal profession.

Strategic technology entrepreneur addressing critical market need for AI literacy in legal services. Architected secure, cloud-native learning platform enabling legal professionals to engage confidently with AI technologies while maintaining regulatory compliance and ethical standards.

- **Founded SavvyLex addressing multi-billion dollar legal AI transformation market** by designing comprehensive learning ecosystem featuring specialized courses, peer community development, and hands-on GenAI enablement for legal professionals without technical backgrounds.
- **Architected enterprise-grade platform on Microsoft Azure** utilizing Azure Functions for scalable microservices, Azure OpenAI Service for secure LLM integration, and Azure API Management with RBAC for agent orchestration and role-based access control.
- **Developed four specialized learning tracks delivering targeted AI enablement:** AI for Law Professionals (tactical use cases), LexAgents (strategic AI agent governance), Demystify AI (non-technical onboarding), and Just Do It (video-first workflow tutorials).