Jason Gregory

PRODUCT STRATEGY | FINANCIAL SERVICES | FINANCIAL TECHNOLOGY | DIGITAL TRANSFORMATION & AI

Clearwater, FL

Professional Summary

Strategic product leader with expertise in fintech, financial services, AI and digital transformation. Proven ability to develop and execute scalable product roadmaps, optimize technology investments, and lead high-impact cross-functional teams. Adept at aligning AI, machine learning, and predictive analytics with business strategy to drive operational efficiency and revenue growth. Experience in stakeholder engagement, product commercialization, and financial technology modernization.

Areas of Expertise:

Cloud-Based Solutions | Strategic Growth Initiatives | Interdepartmental Collaboration | Regulatory Technology | Machine Learning | Predictive Analytics | Budgeting & P&L Oversight | Change Management | Stakeholder Engagement

Willing to relocate to: New York, NY - Boston, MA - Tampa, FL

Authorized to work in the US for any employer

Work Experience

Head of Product & Digital Strategy

MAXGUARD WEALTH-Princeton, NJ

2023 to 2025

• Lead digital strategy, ensuring alignment with business objectives and fintech innovations.

• Provide data-driven insights to optimize investment strategies within regulatory guidelines.

• Oversee end-to-end financial product lifecycle, driving operational efficiencies and supporting compliance initiatives.

• Manage cross-functional teams, fostering collaboration between technology, product, and business units.

• Define and execute digital product roadmaps, delivering scalable wealth management solutions.

Senior Product Manager

TP ICAP-New York, NY

August 2019 to July 2023

• Developed a five-year strategic business plan, expanding revenue in the data and analytics sector.

• Led product development for trading analytics, increasing adoption among financial institutions.

• Managed full product lifecycle, from ideation to go-to-market execution.

• Collaborated with key internal and external stakeholders to enhance financial data solutions.

• Achieved certifications from Pragmatic Institute in various Product Management courses.

Research & Development

MARKETAXESS-London

January 2018 to December 2018

- Led European fixed income research & development team, focusing on data-driven trading solutions.
- Acted as a subject-matter expert on trading analytics, supporting global sales and marketing efforts.
- Contributed to and communicated firm's unique research and data products to clients.
- Provided technical expertise in AI, SQL, Python, and R to optimize trading and portfolio management tools.

Director of Product Management, Analytical Products & Research

Investment Technology Group-London

June 2009 to December 2017

- Designed and launched an electronic platform for institutional investors.
- Spearheaded the global expansion of Transaction Cost Analysis (TCA) using data visualization tools (Tableau, MicroStrategy).
- Led regulatory compliance initiatives (MiFID II), integrating data governance strategies.
- Collaborated with trading desks to develop pre-trade, real-time, and post-trade analytics solutions.

Head of Trading Analytics Europe – VP/Director | Boston, MA - London, UK

- Built and managed a team of analysts providing data analytics for buy-side clients, significantly growing the European client base threefold within four years.
- Worked closely with equity, futures, and FX dealers, portfolio managers, and compliance officers to evaluate investment practices and recommend operational efficiencies.
- Played a key role in managing and initiating client relationships, leading to increased revenue and profitability.

Trading Analyst - Principal

SSGA State Street Global Advisors-Boston, MA

October 2006 to April 2009

- Managed centralized trading data, ensuring integrity and compliance across global markets.
- Conducted pre-trade analysis, optimizing execution strategies for institutional portfolios.
- Developed investment implementation strategies, enhancing portfolio management efficiency.

Stock Trading Associate

Putnam Investments-Boston, MA

August 2004 to October 2006

- Oversaw daily securities trading, ensuring compliance and trade execution accuracy.
- Managed cash and position balancing, resolving settlement issues and corporate actions.
- Supported trading operations, optimizing transaction workflow and efficiency.

Education

Executive Education in Digital Transformation and AI
UC Berkeley

August 2024 to June 2025

Master of Science in Investment Management
Boston University - Boston, MA

Bachelor of Science in Business Administration
Suffolk University - Boston, MA

Executive Education in Artificial Intelligence: Implications for Business Strategy
MIT Sloan School of Management

Skills

- Technology & Product Roadmaps
- Policy and Procedure Development Stakeholder Relations
- Strategic Planning
- Cloud Computing
- Artificial Intelligence (AI)
- Predictive Data
- Budgeting and Financial Analysis
- Machine Learning (ML)
- Client Relationship Management
- Product Innovation and Execution
- Change Agent
- User Experience
- Analytics
- Product Development
- Product Management
- SQL
- Data Warehouse
- Business Requirements
- Team Management
- Agile
- Tableau
- AWS
- Business Analysis

Links

linkedin.com/in/jasoncgregory