# Strategic Initiative Program Executive ♦ IT Development Manager ♦ Consultant

Significant hedge fund and investment banking experience – Deep expertise in planning, structuring and delivering transformational change – Highly effective at driving initiatives across complex business and support organizations – Proven track record of building and leading high performance teams – Applies measured SDLC methodologies honed through years of experience – Extremely hands-on and has expert and current knowledge of existing and emerging technologies.

# Core Competencies

Business knowledge (trading/ops/acctg/Compliance) ♦ Product knowledge (FI/Eq/FX/Deriv)

Complex program execution ♦ Deep IT HW/SW/DB expertise ♦ Team/people management

# Professional Experience

# Balyasny Asset Management – Head of Technology 2012 - 2019

* Rebuilt the development process, hired and upgraded front and back office application teams, added application support, quality assurance and project management disciplines. Managed 30 people (90% new hires) and handled vendor relationships with Eze, Flextrade, Geneva, GlobeOp, Viteos, Hazletree, MiK, Bloomberg and IVP. Increased IT transparency to the business, improved product quality, reduced system incidents and reduced time to market.
* Scaled operations, accounting and treasury systems support (upgraded Geneva, truncated Geneva). Outsourced back office to Arcesium in 2016.
* Implemented Data Warehouse and Security Master (MiK) with significant enhancements to support increased daily and historical volume (200,000 open holdings, 120,000 trades per day). Included Bloomberg back office files to ensure current and accurate Sec Master terms and conditions (Equity and Futures). Built Account Master. Automated security setup and reduced issues. Enabled new risk management processes and supported systematic PM back testing.
* Designed new Equity OMS to support increased volume and functionality, including build out of Quant business. Migrated Equity flow from Eze castle to new OMS/Flextrade EMS platform.
* Built an in-house MACRO platform to support booking of FX, FXO, Rate, Future, Bond, CDS and Repo products. Integrated with TT, FXall and Traiana.
* Built a Trade Management system to manage all downstream feeds to PBs, OASYS/CTM, Markit, books and records. This included a charge management tool to maintain fees and charges (Equities, Futures, SWAPs, Options, etc.). Reduced operational risk e.g., eliminated potential street illogical positions.
* Moved to OMNIBUS accounting while maintaining PM specific positions and P&L. Implemented a daily accrual process. Realized cost savings of > 10 million per year. Enabled trading through a central liquidity book to improve execution quality and cost.
* Delivered Portfolio Optimizer that assigns trades to PBs based on borrow and financing costs.
* Built Portfolio Monitor for Equity and MACRO asset types that includes real-time factor and alpha P&L attribution. Over 200 users.
* Delivered PM Payout system for 100 PMs.
* Supported business expansion (4 – 12 billion USD) in US, Europe and Asia.
* Implemented compliance processes to address Form PF and MIFID II.
* Implemented a commercial job scheduler Active Batch to control and monitor jobs across all servers. Improved reliability of job stream and timeliness to identify and address issues.
* Development leverages the Microsoft stack: Visual Studio, C# .Net WPF/WCF, MS SQL. Jira is used to manage/control tasks and release management. Documentation is maintained through Confluence.

# Wightman, llc/Quantum Strategic 2008 – 2012

## Hedge Fund/Financial Services Consultant

* Reviewed, refined and documented trading and operational processes, systems and controls to support regulatory reviews, investor due-diligence, and strategic planning.
* Developed straight through processing options to allow executing broker, ECN, and prime broker flexibility, implemented OMGEO OASYS and CTM, integrated with Eze Castle.
* Created an automated operations report for the COO, showing key statistics and trends across all departments.
* Designed front to back processes to support separately managed accounts. Integrated with Eze Castle, Trading. Technologies, Geneva, and Prime Broker platforms.

# Credit Suisse/CSFB 2002 – 2008

## Director Strategic Planning and Implementation

* Established and managed a group to govern technology change across the Front Office and throughout FA&O for equities, fixed income and prime brokerage (125 projects involving 500 people). Defined the strategic end state functional and application architecture, and introduced governance to ensure project alignment and legacy retirement.
* Created a strategic 3 year plan to increase revenue to $18b and profits to $4b, involved 20,000 people that resulted in stock price appreciation greater than 9 peer group institutions. Managed status with CEO, CFO, divisions, business heads, and the management committee.
* Designed the non-compensation cost reduction program with the goal of reducing costs by $1b. Worked globally across departments to identify and establish hundreds of cost saving initiatives.
* Initiated an IT performance improvement program that focused on both applications development and infrastructure.
* Led a study to determine how to be more client focused. Worked with the top 50 executives to refine ideas including organizational change. Analyzed global asset distribution and fees to identify the most profitable client segments.
* Refined and deployed global account profitability models. These models contrast revenue income against fully loaded costs to determine our most profitable relationships. This important tool allowed a highly tailored alignment of workforce based on value and type of client relationship.
* Worked with the equity division to evolve their relationship management practice.

More detail will be provided on request for the following jobs:

# Soros Fund Management (Director of Systems Development)

# Andersen Consulting (CSFB)

# Tiger Management (Director of Systems Development)

# Morgan Stanley (IT Vice President)

# Andersen Consulting (Alex. Brown, ING, E\*Trade, JP Morgan, Salomon Bros)

# IMI Systems (Salomon Bros)

# IBM UK – Program Manager/Systems Programmer

# Education

B.Sc. Computer and Microprocessor Systems Engineering – Essex University, England