

DAVID MA

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Summary	Financial services and technology operator with a passion for business operations, analytics, growth, and strategy.	
Experience		
2018-present	MARSH – Insurance Broker Project Manager – Victor Insurance (Management General Agency) <ul style="list-style-type: none">Worked with Victor CEO and COO to create a 3-year strategic plan for the newly formed Victor group of businesses – seeking and securing approval for a growth investment from Marsh executive committee.Conducting active exploration, due diligence, and financial analysis of multiple M&A opportunities.Driving a cross business unit reporting framework to analyze portfolio strategy across the new company.	NEW YORK, NY
2016-2018	Strategic Projects – Global Risk and Digital <ul style="list-style-type: none">Led a 10 person executive working group to create strategy, business, and operating plans for Dovetail, a tech-based insurance exchange, received Marsh executive approval for a 40% budget and headcount increase.Overhauled a manual reporting process at Dovetail from spreadsheets to an automatic Qlikview dashboard.Designed and conducted a broad survey of small commercial insurance portals to determine Marsh's competitive position in Small Commercial Insurtech based on UX, product, and quoting appetite.Created a business case and secured investment in a new front-end tech portal for Marsh's MGA business.	
2014-2016	OPENFOLIO – Personal Finance Fintech Startup Head of Marketing and Business Development, User Support, and QA <ul style="list-style-type: none">Placed unpaid data driven content marketing into Reddit, FOX, CNN, Forbes, TheStreet, creating 8k+ users.Sourced and negotiated a partnership to feature aggregated user data on CNN Money's website and mobile app, generating 5k+ impressions per day. Supported a similar partnership with Fidelity brokerage.Ran \$5K a month paid user acquisition campaign with the support of an advertising agency.Designed tracking and analytics of user data in Mixpanel / Segment for marketing and business intelligence.Ran user support, feedback, and QA. Built FAQ and help center. Created user support workflow and scripts.	NEW YORK, NY
2008-2014	NYSE EURONEXT GROUP - The New York Stock Exchange Director of Corporate Strategy and Development <i>Strategic Analysis and Planning</i> <ul style="list-style-type: none">Worked directly with NYSE CEO to produce the 2012 Board Strategy presentation, which was used for positioning NYSE Euronext for the combination with Intercontinental Exchange.Created and ran annual strategic workshops with business heads to set budget and tech investment priorities.Created a tracking system for market share in international derivatives markets. Created a customer incentive scheme for UK-based product Swapnote, targeting the \$400 trillion interest rate swap market. <i>Deal Execution and Financial Modelling</i> <ul style="list-style-type: none">Led a UK-based team through a billion-dollar multi-staged bidding process for the London Metals Exchange. Drafted bid letters, presentations, financial models, directed due diligence teams and advisors.Structured the equity and income distributions for a highly complex mutually-owned partnership between NYSE's AMEX Options exchange and a group of 7 broker dealer / capital markets partners.Led the due diligence and investment in The Receivables Exchange, a startup trade finance exchange.Strong financial modelling skills. Worked on 20+ deals/projects over 6 years. Managed a small team.	NEW YORK, NY
Education		
2004-2008	COLUMBIA UNIVERSITY – SCHOOL of ENGINEERING Bachelor of Science in Operations Research, Minor in Economics <ul style="list-style-type: none">Finance Chair for Columbia Democrats. Member – Multi-cultural Business Association. 2007 FTV Capital – Researched and cold called 100+ startups to source potential investments. 2006 KeyBank – Shadowed credit trading desk. Ran reconciliation on Credit Default Swap contracts. 2005 GE Healthcare – Tested and assembled components for MRI machines.	NEW YORK, NY
Community		
2012-present	RED HOOK INITIATIVE Board Member – Finance Committee Chair and Treasurer <ul style="list-style-type: none">Present budget and financial update to board on bi-monthly basis. Advisor on community tech committee.Oversaw the growth of RHI from a <\$2M organization to over \$4M in 2018.	BROOKLYN, NY
Personal	Fluent in Mandarin Chinese. Emigrated from Beijing at age 6. Avid runner and snowboarder.	