JASON BRINBERG

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Summary

Organizational leader with demonstrated market strategy, management consulting, and technology expertise. Experienced influencing cross-disciplinary teams to drive profitability and operational effectiveness. Proven ability to develop and motivate staff in alignment with commercial goals.

Skills

Product Ownership	Stakeholder Management	Strategy Definition
Agile Methodologies	Software Documentation	Solution Scaling
Backlog Prioritization	Business Case Definition	Product Vision
Feature Development	Budgeting and Forecasting	Metric Definition
Decision Making	Executive Presentation Delivery	Roadmap Creation
Problem Solving	User Experience Research	Issue Identification
People Management	User Acceptance & Adoption	Risk Management

Professional Experience

North Star Funds – Founder   2017 to present
Portfolio Manager and Chief Technology Officer

- Launched a venture capital fund investing in emerging technology companies and digital currencies
- Raised money from accredited domestic and international investors
- Reviewed company fundamentals, met founders and CEOs of blockchain companies and managed investments of coin offerings, token sales, and private placements
- Created web based processes for investment management, reporting and advisory services

Bank of America Merrill Lynch – Vice President, Counterparty Risk Technology   2015 to 2017
Project Manager, Traded Products Capital Calculation

- Recruited and led team of 22 business analysts, Python developers, ETL developers, and testing professionals to implement internal models methodology calculators producing exposure and risk weighted assets used for regulatory reporting
- Automated daily variance reporting and reconciliation
- Defined budget and multi year plan with multiple production releases to deliver functionality incrementally to forecasting, capital reporting and front office consumers
- Managed relationship with the product owner, business sponsors and technology leadership

JP Morgan – Vice President, Asset Management Risk   2013 to 2014
Project Manager, Asset Management Business Management

- Built an organization spanning market risk, credit risk, and operational risk governing $2+ trillion assets under management
- Defined governance process for 150+ committees across asset management; inventoried risk reporting across all lines of business and derived level of effort and cost of ownership measures
- Faced off with regulators and managed internal audit examinations; prepared materials, facilitated reviews, disseminated conclusions, identified action plans, and drove remediation activities
- Managed multiple business management tasks in parallel, including budget, direct expense, and headcount projects

Sapient Global Markets – Senior Manager, Trading and Risk Management   2005 to 2013
Management Consultant – JP Morgan Investment Management Technology and Operations
- Documented current state processes and made workflow improvement recommendations for U.S. Equities Trading, Global Multi-Asset Group portfolio management, and cross-product solutions organizations
- Identified process improvement with Portfolio Managers and Traders managing over $300 billion
- Led multiple engagements as sales executive and project manager for seven consultants and three client employees

Program Manager and Agile Coach – Fidelity Fixed Income Research and Portfolio Management
- Facilitated workshops to define the product vision and roadmaps for iOS research distribution
- Trained team members to effectively lead daily standup, sprint planning, showcase and retrospectives

Program Manager and Business Consultant – Bloomberg Integration
- Created connectivity between asset managers' order management systems and Bloomberg Indication of Interest (IOI) functionality through design
- Designed and implemented a .Net tool to create order drop copies, translate to XML, and enable relevant order information to be visible on traders' terminals
- Defined traders' requirements, facilitated user acceptance testing, and managed production releases
- Defined sales strategy to scale and minimize marginal cost of implementation with additional asset managers

Program Manager – Merrill Lynch Commodities Merger
- Led the migration of Bank of America Commodities trading platform to leverage Merrill Lynch's capabilities
- Managed the novation of existing clients onto target legal entities and new platform
- Instituted web-based reporting platform to communicate financial metrics

Business Analyst – Merrill Lynch Institutional Client Service
- Delivered strategic organizational design and process improvement recommendations to increase Hedge Fund client base and market share and improve operational client service offering
- Performed a gap analysis of the current state versus the required components of a competitive client service offering by leading working sessions and client meetings
- Defined a future-state client service organizational model with the aid and input of client stakeholders

Education

Bachelor of Science in Computer Engineering   ***2005***
University of Pennsylvania, Philadelphia, PA
Dual Minor in Economics and Mathematics
Notable coursework: Econometrics, Fixed Income Securities, International Monetary Economics, Investment Management & Portfolio Theory, Statistics, Database Design, Programming Languages & Techniques, Calculus III
Penn-Lehman Automated Trading Project: investigated, designed, and implemented algorithms using C++ for automated day trading with real-time equity market data
Men's Varsity Crew: coxswain