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PROFESSIONAL SUMMARY

Experienced product professional specializing in fintech and front-end applications. Skilled in modern product management methodologies with a strong focus on user experience. Created in-depth market and competitor analysis, and fostered partnerships integrations with other software vendors. Collaborate with senior management to provide critical updates and project status, ensuring alignment with organizational goals and priorities.

WORK EXPERIENCE

TONTINE TRUST, Lakewood, Colorado, Aug 2023 – Present
Head of Product
Tontine Trust is the leading fintech in lifetime income pensions, competing in the insurance annuity space.
• Vision: Play a pivotal role in shaping the product vision, ensuring that UX/UI design decisions align with the company's long-term objectives and user needs.
• Strategic Planning: Develop and execute a comprehensive product strategy that encompasses the full spectrum of product development, from ideation to post-launch optimizations.
• Product Roadmap: Oversee the creation and management of a dynamic product roadmap, aligning with market needs, business goals, and stakeholder expectations.
• Integration Expertise: Seamlessly integrate with Identity, Accounting, and Distribution Methods, enhancing platform efficiency and reliability.
• Stakeholder Collaboration: Collaborate closely with internal departments, external partners, and key stakeholders to gather feedback and ensure alignment with the product vision and strategy.

TRADESTATION, Lakewood, Colorado, Dec 2021 – Aug 2022
Senior Product Manager, Client Applications
• Performed industry and client research on retail trading space, presenting findings to various teams for developing an enhanced client applications vision.
• Led the implementation of a Cryptocurrency web trading application for retail investors, organizing vision and steering the team towards a more agile product management approach.
• Advised the Product Management team on complex equity options strategies and user interface enhancements for the options trading platform redesign.
• Monitored key performance indicators (KPIs) to drive product optimization and measure success.

RANDSTAD (Contracting with Charles Schwab and Co.), Lone Tree, Colorado, Nov 2020 – Dec 2021
Product Owner, Stock Plan Services
• Conducted client interviews to gather insights on UI design for Stock Plan Services (SPS) software, transforming feedback into actionable user stories in JIRA.
• Managed and prioritized backlog for multiple release cycles, ensuring timely and efficient product rewrite.
• Collaborated with development and technical design teams to enhance performance metrics and achieve optimal results.
• Devised a user-centric rules engine, empowering clients to configure bespoke rules tailored to their firm's requirements.

BROADRIDGE, Wheat Ridge, Colorado, Sep 2012 – August 2020
Director of Product Management
• Formulated and executed product strategies for a portfolio of North American investment trading products, catering to banking and broker-dealer clients in the US and Canadian markets.
• Managed seven investment trading products for Order Management Systems in the Wealth Management area.
• Launched Charles Schwab's international trading and foreign currency (FX) expanding global market reach.
• Fostered a servant leadership approach by managing a team of remote Product Managers in the US and Canada.
• Engineered a novel compliance risk management system, enabling the firm to regain regulatory compliance and avert substantial fines.
• Led a diverse team of thirty across development, design, QA, and product management to implement new functionalities across various technologies.

TEK SYSTEMS (Consultant at Broadridge), Wheat Ridge, Colorado, Jan 2010 – Sep 2012
Senior Product Manager
• Partnered with engineering, design, and data teams to develop and launch new features and functionality.
• Analyzed user behavior, market trends, and competitor insights to inform product decisions and prioritize initiatives.
• Worked closely with marketing and sales teams to ensure product messaging and positioning aligned with target customers and market segments.
• Led product discovery efforts, including user research, prototyping, and validation.

LPL FINANCIAL, Lakewood, Colorado, Jan 2004 – Jan 2010
Self Employed Financial Advisor
• Built investment advisory business as an independent advisor within a federal credit union.
• Advised clients on investments, financial planning, and forecasting using products such as annuities, equities, mutual funds, bonds, and ETFs.
• Performed investment presentations to several government agencies in the Denver area including the FBI, IRS, Government Accountability Office, US Marshalls Office, and the EPA.
• Mitigated risk in clients' portfolios using advanced equity options techniques.
• Taught other advisors how to help reduce risk through advanced hedging methods, including collars.

EDUCATION
Bachelor of Science in Business Administration, Finance
The Ohio State University - Columbus, Ohio

CERTIFICATIONS AND LICENSURE
• Pragmatic Foundations Certification – Product Management
• Former Series 7, 63, and 65 Licensed
• Former Life Insurance, Variable and Fixed Products Licensed
• Chartered Federal Employee Benefits Consultant

SKILLS

Product Strategy, Fintech, B2B, B2C, Entrepreneurial, Distributed Platforms, Project Management, Agile Methodologies, Scrum, Roadmap Development, User Story Creation, Product Lifecycle, Feature Prioritization, Stakeholder Management, Market Research, UI/UX Design, API Implementations, Data Analysis, User Testing, Market Segmentation, Product Analytics, Leadership, Outsourcing, Strategic Roadmap, Problem Solving, High-Value, Marketing, Tools, SAFe, SCRUM, Kanban, Jira, Figma, KPIs, SaaS Business, B2B, Google Suite, Slack