

**PROFESSIONAL
SUMMARY**

Experienced financial professional with over sixteen years in the industry, seeking to leverage recent coding skills in Python, SQL, C, Flask, HTML, and more, to transition into a role focused on data analysis, process automation, or software development. Proven track record in team leadership, process optimization, and project management, with a passion for utilizing technology to drive efficiency and innovation.

SKILLS

- Programming: Python, SQL, C, Flask, HTML
- Financial Instruments: Equities, Fixed Income, Derivatives
- Data Analysis, Process Automation and Risk Reduction
- MS Office Proficiency
- Bloomberg Terminal Proficiency
- Team Leadership and Training
- Attention To Detail
- Decision Making

EXPERIENCE

January 2018 - January 2021

Team Lead, Corporate Actions and Pricing Group

BNY Mellon Middle Office Operations | Pittsburgh, PA

- Performed an instrumental role in the migration of accounts to legacy Mellon Capital platforms after merger of BNY Mellon's North American boutique investment management groups
- Integrated department procedures and standards with new portfolio management groups, ensuring seamless operations
- Led transition to paperless archiving of all asset pricing and corporate action processes, reducing physical recordkeeping costs and facilitating remote work during the COVID-19 pandemic
- Conducted performance evaluations for team members.
- Collaborated with other team leaders to achieve company goals.
- Reported on team performance to upper management regularly.

January 2011 - January 2018

Manager, Corporate Action and Pricing Group

Mellon Capital Management | Pittsburgh, PA

- Managed an on site team of five associates, including hiring, training, and performance evaluations
- Trained a support team in Pune, India, transitioning tasks and ensuring follow the sun coverage for department.
- Established department procedures and maintained and reviewed precise written documentation subject to audit
- Automated manual tasks individually and with IT team, reducing costly departmental errors annually

- Supervised filing of department generated records for audits and historical data storage
- Facilitated discussions with stakeholders across the firm to address concerns, resolve issues, and ensure alignment with departmental goals.
- Advised prospective clients of department structure, policies, and procedures, fostering understanding and confidence in our operations.

January 2005 - January 2010

Senior Data Management Specialist, Corporate Action and Pricing Group

Mellon Capital Management | Pittsburgh, PA

- Ensured pricing integrity for various investment instruments by monitoring exception and error reports
- Managed voluntary corporate action elections between Portfolio Management team and custody
- Research and summarize market events at request of department stakeholders
- Manually posted corporate actions and reviewed automated actions in internal portfolio management system
- Reviewed and performed daily cash and position reconciliations for accuracy
- Calculated and published fund valuations to clients, maintaining data integrity across platforms.

EDUCATION

Master of Business Administration
West Virginia University, Morgantown, WV

Bachelor of Arts in Psychology
West Virginia University, Morgantown, WV

CERTIFICATIONS

- CS50x: Introduction to Computer Science, Harvard University (edX), 2024
- CS50p: Introduction to Programming with Python, Harvard University (edX), 2024
- Investment Foundations Certificate, CFA Institute, 2013

PROJECT PORTFOLIO

<https://clawback72.github.io/portfolio/>

PUBLICATIONS

Co-author of (2005) "Demonstration of Parallel Processing Computing: A Scalable Linux Personal Computer Cluster Approach," Journal of Information Systems Education: Vol. 16 : Iss. 2 , 231-240. Available at: <https://aisel.aisnet.org/jjise/vol16/iss2/12>