

**Name** Samuel S. Cooley  
**Nationality** American and Swedish (EU)  
**Telephone** +46 70 812 1770  
**Email** [sam.cooley@cooleyassociates.com](mailto:sam.cooley@cooleyassociates.com)  
**Languages** English (native), Swedish (fluent), Spanish (comprehension)

Sam is a Senior Consultant and Advisor and has exceptional expertise with financial systems. He has been a treasury and asset management consultant since 2000.

Sam has extensive technical knowledge and a background in economics, finance, software systems and technology infrastructure. He brings an analytical approach and creative capacity to problem solving, solutions architecture and business development.

Experience/Education	Position	Year(s)
Cooley Associates	Owner/Senior Consultant	2011-
TradeTech Consulting	Partner/Senior Consultant	2004-2011
Trema (now Wall Street Systems)	Senior Consultant	2000-2003
G.P. Technologies	Developer	1999-2000
Boston University	B.A. Economics	1994-1999
SCS	Owner/Consultant	1996-

## Business and Management

- Financial industry:
  - Treasury and Asset Management operations
  - Bank operations
  - FX, FI, Equities,
  - Reporting, compliance and risk management
  - Accounting
- Project management:
  - System implementations
  - Upgrade and patch projects
  - Project specification, planning and design
  - Change management/change initiatives
- Management:
  - Management groups
  - Managing developers
  - Managing consultants
  - Small business ownership experience
  - Vision/Strategy/Tactics/Operations
- Board:
  - Board and advisory board positions
  - Officer roles
- Non-profit/Community:
  - Group leadership
  - Community and organization dynamics
  - Board and advisory boards

## Technical

- System integration:
  - IT (configuration, repair, build)
  - Networking (routing, firewalls, wireless)
  - Security (LDAP, VPN, SSL/TLS, PGP)
  - Availability (RAID, cluster (MSCS, VCS, HA), replication/DR (Slony-I, MSSQL))
  - Scalability/Performance (tuning, load balancing, distributed computing)
- Programming/Development:
  - C, Java, Pascal, Perl, PHP
  - HTML/XML/XSL/CSS/Javascript
  - Shell/batch script
  - SQL (TSQL, PL/SQL)
  - VB/VBA/ASP/.NET
  - CVS/SVN/MSSS
  - Eclipse/Emacs/vi/MSVS
- Platforms:
  - FreeBSD/HP UX/Linux (RedHat/Ubuntu/Debian)/OS X/Solaris
  - Windows 2.x – present
  - Apache/IIS
  - JBOSS/Tomcat/Caucho/WebSphere
  - MSSQL 7/2000/2005, Analysis and Reporting
  - MySQL 3/4/5
  - MS Access
  - Oracle 9/10
  - PostgreSQL 7/8 and Slony-I replication
  - Sybase 11/12/12.5+

## **Roles and responsibilities**

### **Owner/Senior Consultant at Cooley Associates**

Leveraging core skills, experience and networks this business is involved in:

- Advisory and consulting within technology and financial systems for complex enterprises
- Solutions architecture and audits
- Business development and start-ups
- Social entrepreneurship and impact investing
- Networking, recruiting and sales including workshops within:  
Technology; Financial Systems; American-Sweden Intersection
- Board and advisory board positions

### **Partner/Director/Senior Consultant at TradeTech Consulting**

Directed business segments as well as acting in senior consultant role on projects for treasuries, asset managers and financial institutions. Work developing service offering as well as direct involvement in client projects and on operations for financial industry systems and infrastructure solutions.

Work included engagements and relationships with the largest Scandinavian and international clients and prospects including: Volvo, Electrolux, SAS, SBAB, SEB, Skanska and in Chile, Egypt, Qatar, Switzerland, Canada and the US.

Joined TradeTech as one of 15 staff and left as a partner with over 40 active in the company.

### **Senior Consultant at Trema [now Wall Street Systems/ION Trading]**

Sam acted as principle consultant on numerous implementation and upgrade projects as well as being a senior resource on interfacing and customer specific development engagements.

He also shared leadership of the North American professional services team including responsibility for internal initiatives, management strategy, tactics and mentorship.

During time at Trema, Sam received explicit commendations for involvement in key strategic sales projects and was also the primary developer of several solutions that secured significant further business.

### **Developer at GP Technologies**

Designed and developed database backed dynamic websites and applications bringing numerous brick-and-mortar businesses into online presences. This position also involved significant work and involvement with a hardware processing (testing, certification) and repair within a related refurbished and overstock wholesale and auction business for computers and IT options.

### **Owner at SCS**

Sole proprietorship involved in hardware, software, sales, consulting and other technology and process flow related work. This business was founded while Sam provided hardware and software services during high school and was reborn as a consulting business towards the end of his college career.

Project examples	Description	Year
Retail venture operational assessment	Review of business plan, operations, market positioning and opportunities	2011-2012
Wallstreet Suite infrastructure solution (Global industrial supplier)	Based on explicit customer requirements: architect, implemented a proof of concept, documented, and supported test, production and disaster recovery implementations of a full WSS infrastructure. Final solution included Microsoft Clustering and Disaster Recovery for internal redundancy in production site and replication to geographically diverse secondary site. Numerous demonstrations and exercises including workshops and team development and knowledge transfer sessions.	2010-2011
Wallstreet Suite upgrade project (Global industrial supplier)	Senior Consultant with numerous points of involvement on upgrade project from WSS 6.5 to 7.2. Involved in work with TRM, CMM, ACM, TRMSWIFT, etc. Provided development, troubleshooting and advisory to both TradeTech and client teams.	2010-2011
Wallstreet Suite comKIT development workshop (Global industrial supplier)	Structured, sold and delivered a workshop to establish a functional comKIT development environment and support internal development team in initial use of the components and platform. Supported developers as they began developing solutions based on comKIT.	2010
Wallstreet Suite advisory (Global automotive finance group)	As a Senior Advisor this was a packaged Operational Assessment which included preparation, information gathering, analysis, an extensive report and follow-up discussions of implications and possible actions.	2010
Wallstreet Suite upgrade sale (Global industrial supplier)	As a Sales Expert there were numerous client meetings and workshops to assess requirements, develop a solution, negotiate and finalize a project plan with scope study and agreement.	2009-2010
Relationships Resources and Solution Sales	By building a comprehensive database of resources and clients in the TradeTech sphere of influence, identified and secured resource and customer relationships to broaden TradeTech's role as a global leader in WSS experience.	2009
Wallstreet Suite advisory (Chilean retail bank)	As a Senior Consultant this role as advisor and troubleshooter involved support of local staff and consultants to continue stabilization and roll-out of the implemented WSS solution including numerous iKIT components.	2008-2009
Wallstreet Suite implementation (Chilean retail bank)	As a Senior Consultant this project role involved expertise critical to resolve project issues and stabilize production operation. Direct results included go-live of the active phase of a system roll-out and sales of further consulting to assist in a follow-on phase that also went live within two months of initial engagement.	2008
TradeTech Toolbox (TTC)	As Director of Development and Products owned plotting road-map for product development based on identified client needs and a vision for the product as a unifying tool for financial operations.	2007-2008
Manager of Development and Products (TTC)	During 2007 and into 2008 as Director of the business segment responsible for internal assignment and structuring the development approach. Included design, creation and integration of information and development management tools into a Sharepoint intranet portal.	2007

Batch Job Management Framework (AP3)	As architect and lead developer of the batch management component in the TradeTech Toolbox involved implementation of platform to support needs of an asset management environment with numerous internal and external systems interfaces.	2007
Manager of Finance and Asset segment (TTC)	During the fourth quarter of 2006 serving as interim Director of a newly defined business segment responsibility included structuring processes, client relationships and resource management. Launched Sharepoint portal for segment.	2006
Systems architecture and support (AP3)	As a Senior Consultant at an asset manager that had recently completed implementing a core finance system this project involved stabilizing production processes and identifying process and practice improvements for ongoing operations.	2006
Corporate spin-off project (Husqvarna from Electrolux)	As Senior Consultant and Developer the deadline driven project to de-couple the finance operations from the existing installation was delivered on time and with minimal production impact, preparing a newly spun-off business for transition to free-standing operations.	2006
SWIFT MT940 bank statements interface (Electrolux)	Senior Consultant and Developer roles in specifications and initial development as well as project management and handover of development to replacement resources.	2006
SEBScreen interface (Electrolux)	Senior Consultant, Developer Bank payments interface	2006
Batch distribution framework (SBAB)	As Solution Architect and Developer, the framework provides a structured way of handling core business transaction interfaces, significantly reducing time for nightly batches on existing hardware while preparing to scale in the future. This effectively provides a GRID/distributed comKIT API farm for WSS integration. The project was well received and extensions were promptly funded.	2005
Finance KIT (Wallstreet Suite) upgrade (Skanska)	Senior Consultant involved with various aspects of major version upgrade project including interfaces and handling 3rd party custom application integration in the new version.	2005
Finance KIT upgrade pre-study (Skanska)	Senior Consultant doing analytical work to scope and create project requirements for pending upgrade project.	2005
Clean sweep (Electrolux)	Senior Consultant and Project Manager roles, this initiative analyzed and itemized to streamline existing operations, increasing stability and performance dramatically.	2005
High Availability architecture	Advisory engagement to architect an HA infrastructure and implementation for a Java/PostgreSQL based web application including proof of concept and documentation. Developed using Slony, Java components, Linux HA, monitoring and maintenance components across diverse hosting and servers.	2006
Development of point-in-time restore/recovery tool	Java add-on product to existing platform to enable administrators to restore/recover point-in-time versions of specific pages (developed/saved within CMS) as stored in PostgreSQL database.	2005
Architecture advisory and Database migration	Advisory engagement to review application and database architect and implement changes and enhancements. Data migration from Access to MySQL database.	2005
Database maintenance structures	As an independent consultant assignments were implementations of backup, maintenance and monitoring for MySQL and PostgreSQL databases across numerous client sites.	2004

Performance Tuning Workshop (Lucent)	Senior Technical Consultant delivering packaged two day workshop with analysis and resulting report and follow-up on identified action items prioritized for execution.	2003
Transaction Documentation Workflow at GE	Architect and Developer of financial transaction documentation workflow system, integrated into existing web trading interface and leveraging core workflow functionality of underlying finance system, also linked to automated documentation scanning and library archiving functionality.	2003
Trema Suite Implementation (General Electric [GE Capital])	Principle Technical Consultant on an intense and tight timeline to deliver an inter-company lending platform based on core finance systems. The inter-company lending process involved subsidiary interaction (via web interface) as well as complex tax and accounting structures reflected by automated generation of mirroring transactions. This project involved most major WSS components including TRM, iKIT, eKIT (TRMWeb) and DMM.	2003
Implementation (Canada Mortgage and Housing Corp.)	Principle Technical Consultant involved in sales, scoping, training, delivery and all project related efforts for mortgage institution implementing a core treasury system (Finance KIT).	2002
Performance workshop (Travelex)	Senior Technical Consultant delivering a packaged one week workshop with significant performance gains in areas of Finance KIT which relieved production user disruptions and inconvenience.	2002
Bank of NY payment interface (Travelex)	Developer of a standard bank interface to handle high volume payment flows for FX transaction settlement and to be used as a basis for multiple future payment interfaces.	2002
Trading CRM solution (FDBM) (Travelex)	Developer of web based trading interface with integrated customer details and statistical CRM elements (most traded currencies, volumes, etc.) in a single user experience. Module built as front end for core finance and trading system and used by numerous traders in multiple locations globally. Several related press releases and extensive follow-up business resulted including strategic system re-selection during a corporate merger.	2001
Implementation (Travelex)	Finance KIT system implementation including in-project upgrade and global roll-out; Senior Technical Consultant, Developer	2000-2002
Forecast interface (Deutsche Post AG)	Cashflow forecast integration with treasury management system Developer	2001
Payment interface (BMW AG)	Chase integration with treasury management system Developer	2001
Implementation (CAT)	Finance KIT system implementation including in-project upgrade Technical Consultant, Developer	2000-2001
Property rental reservation system	Booking system for multi-site furnished rental/hotel manager Developer	1999-2000
Web interfaces and automation	Developer of integration components for core business systems and web site platforms	1999-2000
Residential painting business	Owner and operationally responsible for 15 person (multi-crew) business covering three distinct regions within Greater Boston	1998
Application development	Developer of a real estate event management system	1997-1998
Bulletin Board System operator	Owner and operator of a multi-node system that was inter-networked internationally	1991-1996