



Summary

- Motivated achiever with a multidisciplinary background (quantitative data analysis, finance and investments, project management, risk management, and technology) performs effectively in a highly customer-driven environment and balances variable short term priorities with steady progress toward strategic goals.
 - Domain expertise in finance, investments, and insurance, including successful completion of the Level 1 CFA exam and multiple LOMA designations (FLMI, FFSI, AAPA, ACS, ARA).
 - Able to contribute independently, as part of a small team, or as a significant member of a large team. Accustomed to leading small teams (2-3 people) through small to mid-size projects (1-6 months)
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Career History & Accomplishments

Calamos

Investments

2007 - Present

Senior Technical Architect/Lead Architect

- Managed numerous small to medium projects (green-field ASP.NET MVC applications, batch processes, and brown-field application updates), including full lifecycle management, architecture and code review, PMO interface, working with clients to gather requirements, managing environmental migrations, and maintain the applications after deployment.
- Managed the integration infrastructure architecture and implementation stream of a complex outsourcing project. Responsibilities included all aspects of project management, including task generation, estimation, milestone tracking, resource allocation, and vendor management.
- Led a development team through a significant management transition. Responsibilities included resource allocation, project prioritization and management, product portfolio management, knowledge management and administration, team re-alignment, and strategy.
- Drove application architecture governance and standardization of development tools, best practices, and application architecture patterns via role as chairman of our Application Architecture and Software Standards Committees.
- Set architectural direction and vision for the Trading, Operations, and Corporate Systems business functions, conducting architectural reviews, and providing strategic planning and roadmaps. Created a weekly internal team seminar to drive technology knowledge acquisition and sharing.
- Designed and developed real-time integration orchestrations between Calamos and an outsourcing partner. Full solution employed MSMQ, Websphere MQ, and .NET WCF Services.
- Designed and developed a real-time integration solution between Charles River and Eagle STAR. The solution incorporated MSMQ, BizTalk Server 2006, and .NET Web Services.
- Onboarded and oversaw the development of all new team hires. Provided personal mentoring, technical guidance, and training to each new team member.
- Designed, implemented, and maintained Web Services in an internal, service-oriented application framework written in C#/.NET 3.5 used throughout the enterprise.

**Allstate
Financial**

2002 - 2007

Grid Architect/Planning Consultant

- Provided technical consultation to executive leadership in the development of an Enterprise Risk Management (ERM) system. The role included vendor management, communication across organizational boundaries, and development of a strategic enterprise modeling vision.
- Implemented an asset/liability allocation system using genetic algorithms to optimize a variety of financial metrics. The application integrated various vended packages (Infragistics, FlexCel, Extreme Optimization) into a rich .NET Windows Forms application.
- Analyzed, designed, and developed an ab initio-based system to enable world-class risk metrics in high-statistics stochastic scenario analyses based on grid-enabled TAS and MoSes liability models.
- Selected, trained, mentored, and managed an intern through the Allstate Internship program.
- Created a reusable data model for multiple financial applications, including a stochastic economic scenario generator and automated capital market data feeds.
- Analyzed and migrated MS-Access and MS-Excel-based financial applications (including VBA) to more robust platforms. Migrations included automating data input and output as well as VSTO integration.
- Created object-oriented C# .NET applications leveraging NUnit tests and NAnt scripts for test-driven development (TDD) and Continuous Integration (CI).

Technical Architect

- Served as .NET application architect for Allstate Financial's strategic web-enabled electronic application system. The role included rapid prototyping, build script setup (NAnt), Continuous Integration setup (CruiseControl.NET), integration of interdependent web projects, mentoring, and code reviews.
- Developed real-time integration components for communication to policy administration systems (AccessAllstate.com), using BizTalk and .Net (C#). Maintained and updated components through many generations of the application.
- Defined coding standards and code review process for Allstate Financial .NET development projects.
- Provided technical leadership, code reviews, analysis, and architecture for implementations of Allstate Financial's strategic Service-Oriented Architecture.
- Developed secure web services (WS-Security) to enable customers to access life and annuity policy data for customers via Allstate.com.
- As a core member of Allstate's enterprise .NET framework development team, developed core data access, caching, and web services components.

**DaVinci
Software**

1999 - 2001

Consultant

- Developed C++/ATL/COM components and client-server applications in both Linux and Windows environments for a variety of boutique clients
- Performed analysis, design, and development for J2EE web applications.

**Pearson
Publishing**

2001 - Present

Technical Reviewer

- Provided exceptional constructive technical feedback for proposals and manuscripts in many technology specialties, including Service-Oriented Architecture, Java, Ruby, .NET, and best practices.
- Hosted Service-Oriented Architecture podcasts at InformIT.com (OnSOA channel)
- Praise quotes provided for
 - "Service Oriented Architecture: A Field Guide to Integrating XML and Web Services" – T. Erl
 - "Service-Oriented Architecture: Concepts, Technology, and Design" – T. Erl
 - "Web Service Contract Design & Versioning" – T. Erl
 - "Mashup Patterns" – M. Ogrinz
 - "SOA Governance" – T. Erl
 - "SOA with .NET" – T. Erl
 - "SOA with REST" – T. Erl

Industry Certifications/Affiliations

- Passed the Level 1 CFA exam
 - LOMA Designations (life insurance and financial services): FFIS, FLMI, AAPA, ACS, ARA
 - Sun Certifications (Java 2 platform): SCWCD, SCJP, SCJD
 - Microsoft Certifications (BizTalk): MCP
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Other Affiliations

- Communications Board Member of That Conference
- Current member of the Board of Trustees, Paramount Theatre, Aurora, IL

Education

Ph. D. – Physics, *University of Arizona, Tucson, Arizona, 1999*

Concentration in High Energy Experimental Particle Physics

M.S. - Physics, *University of Arizona, Tucson, Arizona, 1996*

B. S. – Physics and Mathematics *Bowling Green State University, Bowling Green, Ohio, 1993*

Summa cum laude

Keywords

Leadership and Consultation, Enterprise Architecture, C#, .NET, Asset-Liability Management (ALM), Financial Risk Metrics, Data analysis and design, Agile Development, Test-Driven Development (TDD), Continuous Integration (CI), ab initio, BizTalk Server 2002/2006, Enterprise Application Integration, MSMQ, Websphere MQ, Actuarial software (TAS, MoSes), CruiseControl.NET, VSS, Oracle 10g, SQL Server 2000/2005/2008, SQL Server Notification Services, NAnt, NUnit, Economic Scenario Generation, GridServer, grid architecture, Visio, VSTO, FlexCel, DiffEngineX, QRM, Financial Risk Management, Credit Risk, Duration, Convexity, CruiseControl.NET, Service-Oriented Architecture (SOA)