

# DOMINIC A. MANGONON

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## EXPERIENCE

### Treliant, LLC

Senior Consultant, Wealth Management Advisory

New York, NY

November 2018 – April 2019

#### Business Development

- Worked with leadership to plan, develop, and launch a new business line for a PE-backed consulting firm
  - Identified new business and cross-sell opportunities based on industry trends and leveraging existing firm capabilities, resulting in 10 “go-to-market” campaigns for prospect outreach
  - Co-authored 3 thought leadership articles and led teams in the development of marketing materials including conference presentations, service area brochures, and updates to the firm website

### Strategy& (formerly Booz & Co.) — Part of the PWC Network

Senior Associate, Financial Services Strategy Consulting

MBA Intern, Banking & Capital Markets Management Consulting

Chicago, IL / New York, NY

September 2015 – October 2017

June 2014 – August 2014

#### Growth Strategy

- Evaluated organic and M&A related growth opportunities for a leading self-directed / online brokerage
  - Conducted research and analysis to size an opportunity to capture ~\$2T in AUM resulting from an industry shift of investible assets towards online and independent brokerage models
  - Identified a preliminary list of potential acquisition targets to complement existing business capabilities and unlock additional growth, ultimately leading to the ~\$4B acquisition of a direct competitor
  - Assessed opportunities to address technology gaps and improve online customer experience through internal investment, in addition to acquisition and partnership opportunities with industry service providers

#### Business Unit Strategy

- Managed a work stream for a large wealth management firm to create a customer segmentation strategy and execute the migration of 32,000 low-balance clients from financial advisor channels to robo-advisor and self-directed service lines, increasing advisor capacity & productivity by ~5% and reducing fiduciary risk by \$465M
  - Led working sessions with leadership to align on strategic objectives and define key guiding principles
  - Designed processes, reporting and tools for financial advisors to review books-of-business, identify migration exceptions and maximize cross-sell opportunities to other areas within the bank

#### Client Experience & Change Management

- Designed an end-to-end experience across the client lifecycle for a large wealth management firm, working with leadership to create key stakeholder personas, touchpoint / interaction maps and customer journey use cases
  - Developed a coaching playbook and roadmap to assist Field Consultants in transitioning advisor books-of-business towards fee-based fiduciary models
  - Accelerated strategic objectives through the creation of a learning & development curriculum and segmentation of the existing financial advisor population, enabling more targeted coaching & training

#### Target Operating Model

- Identified ~\$14M in run rate savings for an international subsidiary of a leading insurance broker as part of a global cost and organizational restructuring effort
  - Worked closely alongside CFO and other senior leadership to model cost savings & investment required to centralize operations in both near-shore and off-shore locations and construct the overall business case
  - Led multiple branch workshops to understand business process pain points and identify both “quick win” and technology-enabled solutions to optimize operations and increase savings

### BNP Paribas, Corporate and Institutional Banking

Client Services Analyst, Commodities Trading

Rotational Analyst, Trading Operations

New York, NY

February 2010 – May 2013

July 2008 – February 2010

#### Process Optimization

- Facilitated workshops for a Six Sigma improvement initiative resulting in a realignment of the organizational structure of the Fixed Income Documentation Team, improving trade processing time by ~10%
- Developed process controls and VBA macros to reconcile erroneous trades, eliminating potential overnight risk exposure and standardizing reporting procedures to meet with regulatory standards

## EDUCATION

### Carnegie Mellon University, Tepper School of Business

Master of Business Administration (Concentrations in Finance, Information Systems) GMAT: 720/800 May 2015

Pittsburgh, PA

- Leadership: Consulting Club (V.P., Member Development), Graduate Student Assembly (Class Representative)
- Honors & Awards: Consortium Fellow, Merit Scholar, 1<sup>st</sup> Place – 2013 SCIO Case Competition (Team Lead), 2<sup>nd</sup> Place – 2013 McKinsey & Co. Case Competition, Finalist – 2013 ROMBA National Case Competition

### Rutgers University, Rutgers Business School

Bachelor of Science in Finance

New Brunswick, NJ

May 2008