

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

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