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EXPERIENCE: eMoneyAdvisor, Radnor, PA July 2015-Present

Product Owner – Product Management

- Develop, refine, and prioritize functional user stories for new and existing third party integrations with a team that supports over 14 deep integrations across financial advisory disciplines including CRMs, Performance Reporting, Risk Management, and others. Lead development team through planning, refinement, and retrospective Scrum ceremonies.
- Create low fidelity wireframes and story boards for new features to drive requirements discussion from the view of the end user with stakeholders and coordinate with UI/UX to turn those into high fidelity wireframes where needed for the development team.
- Present demonstration of features to internal and external stakeholders to gather feedback in order to iterate on features to ensure the results matched the vision.
- Conduct interviews with users to assist in understanding workflows for building new functionality, understanding their needs overall to improve adoption of features, and collaborating with 2nd level customer support to resolve user issues.
- Collaborate with the larger Product Management and Business Development organizations to develop the roadmap and vision for third party integrations, and ensure that it aligns to larger business goals.
- Build and maintain relationships with other third parties to streamline support, develop new features, and to build trust to have a strong partnership. Collaborate with internal Business Development and Legal departments to ensure that our agreement has the right support needed for the teams both during and after the development cycle.
- Collaborate with the training and customer service department so they have enough understanding to support the integrations. Work with Sales to make sure they have proper credentials to give demos of the functionality. Educate technical support and training to ensure that they can coach users on the functionality of the integrations.
- Conduct demos of working software at a companywide “Appy Hour” and for hundreds of users on webinars, edit scripts and record videos for the official youTube channel explaining functionality.
- Presented the integrations portion of the product roadmap on the main stage at the 2015 Advisor Summit, and the advisory board early 2016 meeting.

SEI Investments, Oaks, PA June 2012-June 2015

Product Owner

- Developed and prioritized functional user stories for new optimization engine to enhance automated portfolio rebalancing. Coordinated content dependencies and end-to-end testing among 5 development teams. Led coordination with product management to ensure delivery meets vision.
- Created and presented system/product demo of new optimization architecture to key program stakeholders including 2 clients demonstrating functionality built by 5 teams over 3 development iterations.
- Contributed to the vision and roadmap of portfolio management with Product Management team, using knowledge of the mathematical model to drive decisions.
- Collaborated with the Advisor Network Solution and Platform Design teams to understand business workflows and guided the technical and functional requirements for integration with outside Financial Planning and CRM systems with our Advisor Desktop Experience platform.
- Defined and prioritized backlog of technical and functional user stories for 2 development teams to deliver the internal infrastructure and integration to third party FP and CRM systems, including defining RESTful service structure.
- Increased productivity of 3 remote teams by consulting on their Agile methodology and fostering their relationships with other key members of development teams.

- Functioned as a Business Analyst and Quality Assurance Analyst for 3 teams as a Masters Rotational Analyst over 18 months to gain industry and platform knowledge, including writing integrated J-Unit test cases in Java.

JP Morgan Chase, Newark DE Summer 2007, July 2008-August 2010
Technology Business Analyst

- Developed functional, user and systems specifications to create and maintain software development life cycle (SDLC) documentation for 5 separate projects.
- Coordinated status meetings for the project teams and facilitated discussion between groups to stay on task. Created and managed project plans in MS Project to completion for projects involving outside vendors, and across multiple internal systems.
- Analyzed data developed and managed execution of system integration test scripts and quality assurance testing for all current projects.
- Clarified industry wide specifications for an internal project team on the Options Symbology Initiative.
- Functioned as business analyst in the development of a key training and reference document for the Corporate Action team on their processes.
- Managed work requests to completion to troubleshoot production issues with the Private Bank Trust Accounting System (Mainframe).

EDUCATION: DREXEL UNIVERSITY, College of Arts and Sciences, Philadelphia, PA
Master of Science, Applied Mathematics, June 2012 ***GPA 3.87***

TEMPLE UNIVERSITY, College of Science and Technology, Philadelphia, PA
Bachelor of Science, Mathematics Magna cum Laude: May 2008
Temple University Honors Program, Concentration in Computer & Information Science

SKILLS & SYSTEMS:

Analysis/Software:	Gliffy, Visio, MATLAB; Advanced MS Excel, Novice - SQL, Java, Python
Agile/Project Management:	Agile, XP, Scrum methodologies, Scaled Agile Framework, SAFe Certified PM/PO, Rally, JIRA, Confluence, Trello, Slack, SDLC – Waterfall, HP Quality Center, Microsoft Project

TEACHING EXPERIENCE:

Drexel University, Philadelphia, PA September 2010-June 2012
Research/Teaching Assistant

- Instructed a 3 credit course per term to over 20 undergraduates including 3 hours of lecture and 3 hours of tutoring weekly.
- Designed and administered weekly quizzes and exams, while preparing students for a common final.
- Utilized and tested new online technology for extra credit assignments.

Russell Conwell Center, Philadelphia, PA July 2006 – May 2008
Math Tutor and Classroom Assistant, Summer Bridge Program

- Provided weekly tutoring sessions for 4-6 students in College Algebra to Calculus II to build their math and study skills and develop a successful approach to mathematics.
- Collaborated with full time staff to develop content for the "Tutoring Basic Math Skills" component of the tutor certificate program Instructed a 3 credit course per term to over 20 undergraduates including 3 hours of lecture and 3 hours of tutoring weekly.
- Created lesson plans and lead a daily, thirty minute recitation period to supplement and reinforce class lectures during the Summer Bridge Program 2006.
- Collaborated with instructor of the course by developing lesson plans, exams, and assignments, graded homework and in-class assignments that accounted for 20% of the students' final grade for two sections of College Math I.