Joseph F. Wiedmayer

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A seasoned data-driven solutions designer with a passion for unearthing hidden insights, I excel in crafting, connecting, and enriching complex data landscapes. With over two decades of industry experience and deep market knowledge, I transform vast and diverse datasets into actionable opportunities that drive business growth. My expertise lies in designing and delivering practical solutions to real-world portfolio management challenges. Equipped with technical proficiency, I construct early proof-of-concept systems to quantify the tangible impacts of these discoveries. My unwavering commitment to data-driven decision-making empowers organizations to make informed choices that optimize performance and achieve strategic goals.

Macquarie Group (Philadelphia, PA) **May 2010 – Present**

- Analytics Consultant (Senior Vice President) Jan 2022 – Present

- Data-driven strategist and market expert with a proven track record of identifying untapped growth opportunities and developing data-driven strategies to enhance business performance while maintaining financial stability.
- Led the development of a comprehensive Sustainable Finance Disclosure Regulation (SFDR) disclosure report for European portfolio managers within Macquarie Asset Management's public markets division using Aladdin/BRS positions and security master, enriched with Morningstar/Sustainalytics data to meticulously detail portfolio-level and firm-level sustainability practices.
- Demonstrated ingenuity and technical proficiency by constructing an early proof-of-concept system to identify and quantify the impacts of portfolio managers' behavioral biases present in the decision-making processes to identify strengths, areas for improvement, and ensure consistency in the investment process.

- Quantitative Analyst (Senior Vice President) July 2017 – Jan 2022

- Technical expert with experience in developing tools to enhance portfolio risk and attribution insights for portfolio management teams.
- Established, maintained, and enriched the quantitative data warehouse, ensuring the availability and integrity of critical data for analysis and decision support.
- Conceptualized and implemented a consolidated attribution and risk reporting system, effectively summarizing key performance, risk, and growth metrics for each product within the Equity Department.
- Designed, maintained, and continuously improved various tools, risk reports, and quantitative screens utilized by the portfolio management team, integrating multiple fundamental and macro multifactor risk models.
- Rapidly developed portfolio management and business intelligence tools instrumental in the day-to-day management of over $100 billion in assets under management.
- Successfully retired and replaced a third-party risk attribution system with an internal process leveraging existing vendor infrastructure, resulting in ongoing annual cost savings of approximately $100,000.
- Provided comprehensive due diligence for acquisition opportunities and client/consultant requests, ensuring informed decision-making.

- Technical Business Analyst (Vice President) May 2010 – July 2017

- Played a pivotal role in the divestiture of Delaware Investments from the Lincoln Financial Group following its acquisition by Macquarie Group.
- Developed and implemented comprehensive solutions for disentangling and separating key back office, middle office, and front office systems across multiple business units, ensuring the seamless separation of core systems without disrupting daily operations.
- Effectively managed risks and issues throughout the divestiture process, providing regular and insightful status reports on project progress.
- Collaborated closely with business sponsors to coordinate and deliver key deliverables for each project, ensuring alignment with stakeholder expectations.
- Demonstrated strategic and tactical acumen in planning and executing projects and initiatives, driving efficient and effective outcomes.
- Rigorously upheld compliance, risk management, and security standards throughout the project lifecycle, ensuring the integrity of systems and solutions.
- Leveraged expertise as a Windows and Linux system analyst to identify, document, and manage the configurations of new software and bespoke legacy systems, facilitating a smooth transition to the new environment.
- Successfully designed and implemented desktop application packages for Windows 7 deployment, streamlining the rollout of new and existing software across the organization.

Evergreen Investments (Philadelphia, PA) July 2003 – September 2009

- Portfolio Specialist (Vice President) December 2006 – September 2009
- Asst. Portfolio Specialist (Asst. Vice President) November 2004 – December 2006
- Portfolio Manager Assistant (Officer) July 2003 – November 2004

- Portfolio specialist representing several short and medium-duration portfolio management teams throughout the institutional sales process by gathering and analyzing client investment guidelines and objectives, preparing comprehensive investment proposals and presenting tailored portfolio solutions aligned with client objectives to C-suite decision-makers, resulting in successful client acquisition and significant revenue growth.
- Business analyst for a $200 billion customized fixed-income portfolio management, trading, and credit research team, driving strategic initiatives and ensuring seamless integration of new technologies and processes.
- Subject matter expert supporting the technology, operations, and compliance departments to develop business requirements, specifications, and workflows for new initiatives, aligning business goals with technical feasibility and regulatory compliance.
- Streamlined client reporting by standardizing report formats, significantly reducing the number of customized reports and enhancing operational efficiency.
- Implemented a robust user access review process for mission-critical systems, upholding Sarbanes-Oxley and SAS-70 regulations and safeguarding data security.
- Led a cost-reduction initiative, achieving annual savings of approximately $500,000 within three months through strategic account management.
- Developed and maintained an in-house CRM database for over 1,200 accounts, ensuring data accuracy, accessibility, and compliance with data privacy regulations.
- Designed and implemented a user-friendly drag-and-drop process for calculating performance-based incentives, improving efficiency, transparency, and stakeholder satisfaction.

- Provided insightful market and product commentary to the Board of Trustees, keeping them informed, engaged, and confident in the firm's strategic direction.

Other roles held:

- Executive Recruiter	Parker & Lynch (King of Prussia, PA)	Feb. 2010 to May 2010
- Fund Analyst	State Street formerly Deutsche Bank (Jersey City, NJ)	Aug. 2001 to July 2003
- Fund Analyst	SEI Investments (Oaks, PA)	July 2000 to Aug. 2001
- Caddy	Pine Valley Golf Club	1995-2000

Moravian College (Bethlehem, PA) **June 2000**

- B.A. Financial Economics - Concentration in International Economic and Portfolio Theory
- Amrhein Investment Club Portfolio Manager Scholarship (Former President and Portfolio Manager)
- Founding member of the local chapter of Enactus (formerly Students in Free Enterprise)
- J. Wood Platt Caddy Scholarship
- Delta Tau Delta International Fraternity