

Jason Huey

Objective

Highly motivated professional with extensive experience in the financial services industry and experience in the hypergrowth stage start-up environment. Experience with developing and driving initiatives from concept to implementation.

Professional Experience

Postmates Inc.

San Francisco, CA

Trust & Safety Lead

February 2016- April 2018

Risk & Finance Operations Lead

June 2014- February 2016

- ❖ Founding architect and lead for Postmates' Risk Team – oversaw insurance, fraud, payment operations, and security on the Postmates platform. Experience with insurance claims for liability claims, third-party liability claims
- ❖ Founding architect for the Postmates Trust & Safety program- provided guidelines and process for the entire marketplace to ensure the safety of all users and to protect the company from all losses
- ❖ Claims management for all independent contractor accidents, as well as other legal and administrative service of process
- ❖ Liaised with insurance brokers, insurance firm counsels, and third-party administrators with claims defense
- ❖ Liaised with internal and external counsels and TPAs on workers' compensation, unemployment, disability, civil, and other general risk areas. Handling of pre-litigation and litigation matters, as well as external legal requests
- ❖ Minimized fraud with risk initiatives created by using a combination of in-house fraud rules and tools provided by payment and fraud-detection vendors
- ❖ Analyzed trends to help decision-making and provide insight to trends in refunds, chargebacks, and failed payment fraud
- ❖ Created internal tools to mitigate fraud exposures, and monitor quality of fleet monetary exposures with SQL and BI tools
- ❖ Investigated on all escalated tickets including law enforcement and valid third-party data requests, and serving as custodian of records for Postmates
- ❖ Managed various legal projects around garnishments, unemployment, workers' compensation, tax compliance and other finance related projects
- ❖ Coordinated with different teams with company-wide or segment wide goals to meet OKRs
- ❖ Worked with leadership team on making decisions on insurance policy renewals and audits

SigFig Wealth Management, LLC.

February 2014- May 2014

San Francisco, CA

Asset Management Operations Analyst

- ❖ Day-to-day operations with launch of SigFig Managed Accounts. Managed accounts are “robo-advised” accounts managed by adding SigFig as an advisor to new or existing brokerages and using algorithms to calculate an optimal portfolio per client based on their risk assessment
- ❖ Worked with brokerage documents - new account applications, limited power of attorneys, asset transfers, and letters of instructions
- ❖ Worked with clients to submit correct brokerage documents to institutional broker dealers such as TD Ameritrade, Schwab, and Fidelity

JPMorgan Chase Bank, N.A.

San Francisco, CA and Daly City, CA

Private Client Banker/ Registered Representative

March 2010 - February 2014

Operations Supervisor

July 2004 - February 2010

- ❖ Relationship manager for a Chase Private Client branch. In charge of informing employees, mortgage specialists, as well as affluent clients and prospects of private client offering.
- ❖ Provided exceptional service through a dedicated team with exclusive access to J.P. Morgan's investment expertise.
- ❖ Established, maintained, and managed client relationships. Working with prospects and existing private clients with their financial needs.
- ❖ Profiled and discovering clients' financial needs and plans through recommendation of bank products as well as investment vehicles.
- ❖ Acquired and deepen relationships with clients through a process of relationship management and financial planning.
- ❖ Held various branch positions during duration at Washington Mutual/JPMorgan Chase including branch operations management positions.

Education

San Francisco State University

Bachelor of Science in Business Administration with Concentrations in Corporate Finance and Financial Services

San Francisco, CA

August 2006- May 2010

Skills

Microsoft Office Suite
Microsoft Excel

SQL
BI Tools

HTML/CSS
JavaScript

Claims Management
Account/Vendor Management

Google Suite
GIT