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**SENIOR PROJECT AND PROGRAM MANAGER / DIRECTOR**

**~ PROJECT MANAGER ~ APPLICATION DEVELOPMENT & SUPPORT ~ PROGAM LEADERSHIP ~**

A Project Management Professional (PMP) and Certified Scrum Master (CSM) with broad business, technical and leadership skills developed during 15+ years of project, team, program, and director level experience in financial services technology. A hands-on leader, skillful communicator, thoughtful manager, and seasoned technologist with a history of delivering highly technical change the bank teams leveraging waterfall and agile/iterative methodologies to deliver high quality, multi-platform solutions supporting businesses in asset and wealth management, trade surveillance, compliance, and broker-dealer operations. Strong interpersonal skills, highly adept at facilitating discussions and negotiations with partners of all levels in IT, Corporate Security, Product, Legal, Compliance, Business Units, external vendors, and other stakeholders in maturing and formal PMO settings. Fully versed in Microsoft Project and Office, HP PPM and ALM, JIRA Agile, and Confluence. Experience includes budgets approaching $15M+ and teams of 5 to 80 heads. MBA/MIS, PMP certified, Certified Scrum Master (CSM), Lean Six Sigma Green Belt trained, ITIL trained, United States Army Veteran.

Additional areas of experience include:

* Wealth Management
* Advisory Operations
* Account Billing & Services
* Legal & Compliance
* Trade Processing Surveillance
* Market Research
* Executive Compensation
* CCAR
* Tax Services
* Process Analysis & Redesign
* Program/Project Governance
* Budgeting & Planning
* Virtual & Offshore Teams
* Resource Management
* Waterfall, Agile, Iterative
* Change & Quality Control
* Project Scope & Risk
* Web Portals & Applications
* Microsoft Office, SharePoint
* Microsoft Project
* Reporting Solutions
* HP ALM, PPM
* JIRA, JIRA Agile
* Confluence
* Software Development Life Cycle (SDLC)

**PROFESSIONAL EXPERIENCE**

**SENIOR PROJECT MANAGEMENT CONSULTANT AUG 2018 – PRESENT**

**BROADRIDGE**  **Newark, NJ**

Tax Services Client Onboarding Project Management Consultant delivering on tax year 2018 go-live of the firm’s largest, most complex, most demanding external corporate tax client.

* Build credibility, establish rapport, and facilitate engagement and collaboration amongst external client, business, technology, quality assurance, compliance, and audit stakeholders in a formal SDLC environment.
* Define, initiate, and track full SDLC projects managing cost, schedule, and performance of component projects, while working to ensure the ultimate success and acceptance of the onboarding effort
* Maintain continuous alignment of program scope with strategic business objectives; make recommendations to modify the program to enhance effectiveness toward the business result and strategic intent
* Coach, mentor, and lead personnel within a team environment leveraging JIRA and Confluence
* Present periodic Dashboard reports on the current program, future opportunities, and client issues
* Leveraged JIRA and Confluence to manage daily workflow around risks, issues, prioritization, resource assignment, and critical path

**SENIOR PROGRAM / PROJECT MANAGEMENT CONSULTANT DEC 2014 – AUG 2018**

**CAPCO**  **New York, NY**

Financial Services Management consultant and delivery lead of Business and IT programs, projects, and work streams in risk, wealth management operations, account billing, portfolio accounting, tax management and reporting, CRM, data analytics, and data science.

***Notable Assignments include:***

* *Jefferies* CRM and Data Analytics Reporting and Data Science Project Manager.
* *Royal Bank of Canada* CCAR PMO Market Risk Workstream Lead.
* *Morgan Stanley* *Wealth Management* *Advisory Operations*. Project Manager of multiple SaaS initiatives.
* *Pershing*. Hands on lead responsible for delivering a future state cost basis and tax management/reporting solution.

**PROGAM AND PROJECT MANAGEMENT CONSULTANT JAN 2013 – NOV 2014**

**JRT PROFESSIONAL CONSULTANTS, LLC**

Senior Agile Project Management consultant contracted by major financial services firms to lead IT programs and systems initiatives improving work flows for clients in operations, registrations, continuing education, insurance licensing, credit and rates derivatives trading and straight through processing. Leveraged JIRA Agile and Confluence in a distributed SCRUM environment to document requirements, organize epics and issues, create user stories, prioritize and groom backlog, conduct daily standups, chair sprint review meetings.

Notable clients include *Deutsche Bank, and Citi Group.*

**DIRECTOR / PROGRAM MANAGER, INFORMATION SYSTEMS JAN 2005 – NOV 2012**

**UBS FINANCIAL SERVICES**  **JERSEY CITY, NJ**

Senior Manager of Wealth Management technology programs for a Swiss-based financial services firm.

***Notable Assignments include:***

* **IT Director/Program Manager –** *Corporate Employee Financial Services.*Program Manager for $8M technology program supporting firm’s Executive Compensation Plan Management Business. Directed group of 80+ onshore and offshore employees, contractors, and vendors on a next generation stock admin and reporting platform initiative.
* **IT Director/Program Manager –** *Investment Solutions.*Leader responsible for client onboarding and trading web applications used by 8K+ financial advisors and home-office personnel supporting a mutual fund wrap program valued at $50B+.
* **IT Director/Program Manager***– Investment Solutions.* Leader of Managed Accounts Trade Surveillance process redesign efforts and the delivery of a real-time, paper-less trade correction system.

**MANAGER, INFORMATION SYSTEMS JAN 2000 – DEC 2004**

**UBS FINANCIAL SERVICES**  **WEEHAWKEN, NJ**

Technical manager of mission critical technology projects for a Swiss-based financial services firm.

***Notable Assignments include:***

* **IT Project Manager** – *Corporate Employee Financial Services*. Team Leader in the delivery and maintenance of web applications used by 100 corporate clients managing stock benefit programs valued in excess of $30 trillion.
* **IT Development Manager** – *Operations Systems*. Leader of team in all phases of the SDLC for the firm’s order break recovery system designed to mitigate market exposure from technology breakdowns.

**EDUCATION AND CREDENTIALS**

Master of Business Administration  Management Information Systems, Saint Peters University

Bachelor of Business Administration, Management  SUNY Empire State

Project Manager Professional (PMP)  Project Management Institute (PMI)

Scrum Master Certification (SMC) Ongoing  SCRUM Study

Computer Programming Diploma  The Chubb Institute

**ADDITIONAL COURSEWORK**

Certificate in Information Technology Management (ITIL V3) (Pending)  Rutgers School of Business

Lean and Six Sigma Green Belt Trained  Rutgers School of Business

Primary Leadership Development  US Army