Michael C. Coleman, MBA

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Possesses demonstrated ability to analyze complex analytical problems in order to effectively create and implement technical solutions. A team-player with a track-record of working with multifaceted groups to complete business objectives and projects. Proven communicator who enjoys conveying complex ideas in easy-to understand language.

Professional Experience

Retirable March 2020 - Present

Software Engineer II

- Founding member of Retirable's engineering team. Responsible for the development of Retirable's financial planning offerings, incorporating experience as a software engineer and MBA graduate.
- Collaborates with stakeholders to propose, roadmap and build financial planning products to meet organizational goals and objectives.
- Notable accomplishments:
    - Coordinated with members of the marketing team to identify customer acquisition bottlenecks. Proposed, designed and implemented split tests in order to identify friction points and implemented solutions based upon findings.

EquityMultiple April 2019 - March 2020

Software Engineer

- Leveraged previous finance experience to build and maintain EquityMultiple's online real estate investment platform.
- Notable accomplishments:
    - Collaborated with members of the operations team to reengineer the investment return distribution process. Redesigned tools enabled one operations associate to manage all monthly distributions.

Betterment March 2016 – August 2018

Financial Planner

- Founding member of Betterment's human advice team. Defined new offering's operational processes and created guidelines to ensure consistent advice was provided to each customer.
- Served as embedded subject matter expert in the product and engineering team to craft Betterment's financial planning offerings.
- Interviewed with members of the media regarding specific financial planning topics (Example).

Merrill Lynch February 2014 – March 2016

Analyst

- Met with high net worth clients to define their various financial goals and objectives. Proposed and implemented solutions to help them achieve their goals.
- Organized and coordinated adoption of a new investment platform and portfolios to streamline the team's investment management process. New portfolios improved client outcomes and enabled one individual to manage all investment portfolios.

Education

Rice University, Remote July 2019 - December 2021

- Masters of Business Administration
- Corporate Finance & Investment Management Concentrations

Bates College, Lewiston, ME August 2009 – May 2013

- Bachelor of Arts, History Major, Religious Studies Minor
- Dean's List – Fall 2012 & Winter 2013

Skills & Interests

Certifications: Certified Financial Planner

Tools: Microsoft Excel, Microsoft Word, Microsoft PowerPoint, Google Analytics, Amplitude, Segment

Volunteering: Portland Adult Education English Tutor

Personal Interests: Running, Cross Country Skiing, Hiking, Camping, Fly Fishing, Canoeing

Accomplishments: 2023 Birkie, Eagle Scout