

MAUREEN STOLBERG, CIPM

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DATA SCIENTIST | ANALYTICS LEADER | BUSINESS INTELLIGENCE

Results driven professional who recently completed a master's degree in Data Science after accruing more than 10 years of financial industry experience specializing in data analytics, performance management, attribution modeling, and business process improvement. Experienced in partnering with c-level stakeholders to understand their needs, build impactful analytical solutions, and communicate actionable results to both technical and non-technical audiences.

EDUCATION & CERTIFICATIONS

M.S. DATA SCIENCE, SOUTHERN METHODIST UNIVERSITY – AUG 2020

- GPA: 3.8 – Machine Learning and Natural Language Processing

B.A. CHEMISTRY, SOUTHERN METHODIST UNIVERSITY - JUN 2004

B.B.A. FINANCIAL CONSULTING, SOUTHERN METHODIST UNIVERSITY – JUN 2004

CERTIFICATE HOLDER IN INVESTMENT PERFORMANCE MEASUREMENT (CIPM), CFA INSTITUTE – DEC 2009

PROFESSIONAL SKILLS

Decision Science • Quantitative Analysis • Machine Learning Algorithms • Stakeholder Management • Data Mining Statistical Modeling • Data Visualization • NLP • Predictive Modeling • Portfolio Attribution • Time Series Forecasting • Churn Analysis • Database Management • Business Intelligence • Performance Management • KPI Dashboards

TECHNICAL SKILLS

PROGRAMMING LANGUAGES: Python, R, SAS, SQL

LIBRARIES/PACKAGES: Numpy, Pandas, Matplotlib, Seaborn, SciPy, Scikit-learn, TensorFlow, H2O, NLTK, ggplot2, Twsg

DATA SCIENCE PROGRAMMING TOOLS: Jupyter Notebook, GitHub, Tableau, Teradata, IBM Cognos, MongoDB

FINANCIAL SOFTWARE: FactSet, Bloomberg, PackHedge, Zephyr, eVestment Alliance, DST ANOVA, Morningstar

PROFESSIONAL EXPERIENCE

FEB 2018 – DEC 2018

ANALYTICS CONSULTANT, MARKET REALTY & MANAGEMENT - (NEW YORK, NY)

Boutique Real Estate Management Firm located in Fort Lauderdale, FL. Worked directly with the CEO and CFO to develop marketing research strategies, monitor industry trends and provide recommendations for defining and executing company's digital strategy. Primary objectives include: Help guide market adoption of company technologies, develop and execute email marketing plans across a wide audience, and increase lead generation through thorough analysis and testing.

- Developed comprehensive marketing strategy, implementation plan and creative direction across all media channels spanning email, advertising, events and social media.

MAY 2013 – DEC 2017

VP, RESEARCH ANALYST, CITIGROUP INC. - (STAMFORD, CT)

Developed Citi's global investment product portfolio performance and data analytics platform, comprised of 90+ marketed strategies. Oversaw the design, construction, and implementation of product portfolio performance, standardized attribution modeling, investment analytics and composite reporting in support of the global investment process, client reporting, and global operating platform. Carried out advanced statistical analysis of performance results, using data manipulation techniques (SQL-based) and machine learning algorithms.

- Doubled sales growth in 2014 by developing core marketing investment analytics used to articulate firm's value proposition that led to increased brand awareness and greater market exposure.
- Developed data classification strategy and data integration architecture design for Citi's multi-asset class product portfolio suite (36+) investment reporting and marketing automation platform.
- Oversaw the multi-system conversion of bank's global accounting performance measurement & reporting platform.
- Chaired US composite construction & investment performance corporate governance committee from 2013 – 2016.

APR 2012 – APR 2013

CONSULTANT, DECISION MANAGEMENT, CITIGROUP INC.- (LONG ISLAND CITY, NY)

Developed and executed strategy recommendations via predictive analytics and machine learning algorithms for Citi Branded Cards existing portfolios, representing over \$150B+ in consumer spend. Utilized analytics tools, such as SAS Enterprise, Teradata Analytics, and SQL to incorporate macroeconomic trends as well as competitive and regulatory landscape into analytic endeavors to enhance value proposition design of portfolio product suite. Leveraged IBM Cognos® and other data visualization techniques to generate weekly dashboard reports for senior executives, including CEO, highlighting key performance indicators (KPIs), consumer behavior trends, and digital engagement activity.

- Grew product acquisitions 10% by leveraging proprietary data analytics on consumer spending behavior to enhance new acquisition target offerings, trigger-based campaigns, and treatment evaluation for existing customers.
- Recognized by CEO for increasing the effectiveness of KPI reporting by directly linking performance results with current company initiatives.
- Formed new merchant partnerships by partnering with Citi's business development team to create business intelligence packages based on market insights and consumer behavior trends identified through transactional data mining.
- Developed marketing blueprint for capturing \$65MM of incremental revenue by doubling digital growth in three years.

JUL 2008 – OCT 2011

SR. INVESTMENT PORTFOLIO ANALYST, INTECH INVESTMENT MANAGEMENT, LLC -(PALM BEACH, FL)

Developed, managed, and audited product portfolio analytics related to personalized content marketing materials, totaling 472 attribution and risk statistical reports (per year). Utilized SAS, SQL, and other proprietary data analytics tools to carry out research analysis (primarily empirical) related to performance attribution, BARRA risk factor modeling, and MPT risk/return statistics across various asset allocation strategies.

- Enhanced firm's communication of investment performance by developing presentation reporting measures that best reflect product's value relative to client's current investment portfolio.
- Increased operational efficiency by automating 80% of firm's quarterly performance reporting by automating workflow productivity.
- Recognized by senior portfolio management for developing and automating performance KPI dashboards and one page product performance advertisements that simplified results while maintaining firm's key messaging.

JUL 2006 – JUL 2008

CLIENT SERVICE COORDINATOR, INTECH INVESTMENT MANAGEMENT, LLC- (PALM BEACH, FL)

Acted as the primary liaison professional between clients and firm's portfolio management group for all client reporting including the preparation of investment related analytics used in competitive intelligence, firm valuation reporting, and RFP consultant questionnaires. Worked with the Research team using SAS, SQL and other investment statistical modeling applications to develop answers to data-oriented questions and monitor the accuracy of third-party investment portfolio appraisals.

- Reduced client attrition by collaborating with marketing and sales teams to establish a well-defined communication process for managing client expectations during periods of underperformance.
- Reduced cycle time for core functions and improved data integrity by using relational data architecture for improve data query efficiency that centralized and controlled data used throughout firm, reducing operational risk

MAR 2005 – JUN 2006

CLIENT CONSULTANT, ZEPHYR ASSOCIATES, INC. (INFORMA) -(ZEPHYR COVE, NV)

Worked with portfolio managers and financial institutions to integrate time-series behavioral modeling into client's existing investment due diligence pipeline using Company's platform application. Trained client sales teams of 100+ how used regression analysis to highlight product strengths, minimize weaknesses, and increase competitive position.

INDUSTRY PUBLICATIONS & MEMBERSHIPS

PUBLICATION: "Predicting Attrition - a Driver for Creating Value, Realizing Strategy, and Refining Key HR Processes" -SMU DATA SCIENCE REVIEW – VOLUME 3, NUMBER 2 (2020)

CFA INSTITUTE MEMBER, SOUTH FLORIDA CFA SOCIETY - Oct 2011-present