



COLLIN LAWRENCE

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EXPERIENCE

PRODUCT MANAGER, SS&C Advent Black Diamond (Jacksonville, FL)

3/22 – Present

Award-Winning Wealth Analytics Platform Reporting on \$2.2 Trillion in Assets

- Identified opportunities for new product features using platform analytics, client interviews and industry surveying to drive roadmap thought leadership and maximize client value in previously overlooked areas
- Used product and project management skills to manage and prioritize building and enhancement of product features to successfully delight clients and maximize platform adoption while driving profitable margins
- Defined roadmap for client-onboarding related platform features to maximize adoption
- Utilized project management skills to break down large-scale cross-team initiatives into actionable tasks and prioritize them in an efficient timeline-based framework for structured and efficient execution

SOLUTIONS CONSULTANT, Addepar (Salt Lake City, UT)

9/19 – 3/22

Industry-Leading Wealth Analytics Platform Reporting on Over \$2.7 Trillion in Assets

- Leveraged product management mindset to create an extremely successful services product which garnered and preserved hundreds of thousands of dollars in ARR and boosted client retention by 25%
- Served as charter member of services sales team and pioneered core processes and workflows which resulted in 500% increase in scoping and estimation efficiency
- Served as communications hub for five independent departments
- Created multiple dashboards which served as team's analytics backbone to understand user issues
- Used deep project management skills to deploy numerous client implementations on time and under budget

CLIENT ADVISORY ANALYST, Tolleson Wealth Management (Dallas, TX)

10/17 – 9/19

Full Service, Award-Winning Multi-Family Office with Over \$6B AUM

- Utilized financial technology to communicate complex topics to clients, create workflow efficiencies, streamline reporting projects and develop actionable solutions to a variety of client issues
- Leveraged emotional intelligence and financial advisory skills to build strong relationships with clients and effectively integrate five independent departments to achieve superior results in serving client needs
- Consulted with EVP of Tolleson Private Bank on strategic issues and developed custom interest-rate product using Excel modeling and finance acumen

CONSULTING ASSOCIATE, Moss Adams, LLP (Dallas, TX)

8/16 – 10/17

Largest Public Accounting & Consulting Firm Headquartered in Western U.S.

- Utilizing critical thinking, Excel modeling and analytical skills, delivered self-managed projects to successfully increase client profitability
- Executed restructuring projects and developed creative solutions to minimize client losses
- Used business acumen to independently solve critical issues facing firms in a variety of industries

EDUCATION

BRIGHAM YOUNG UNIVERSITY, Provo, UT – Graduated 2016

Bachelor's Degree, BGS: Emphasis in Business Management

Finance Coursework GPA: 3.7

ADDITIONAL SKILLS AND INTERESTS

- **Oshin Digital:** Currently design, code and write bespoke websites aimed at accelerating business growth
- **Other Skills & Achievements:** Agile Project Management, SQL, Javascript, HTML, CSS, Tailwind CSS, Jira, Confluence, Periscope, Looker, Eagle Scout