



## product leader driving onboarding, activation and growth in digital finance

15-year product leader delivering client-first onboarding experiences that scale. Skilled in driving execution across complex organizations and known for solving problems and translating strategy into measurable outcomes.

### highlights

- ✦ **Built and launched new onboarding experiences** for self-directed and advisor-assisted investment accounts, scaling to over *1M new accounts opened* in 2024 (+20% YoY) across mobile and web channels
- ✦ Align leadership on priorities by **turning tradeoffs into actionable roadmaps**, partnering with business, engineering, design and risk to drive adoption and efficiency across a platform *used daily by 2K+ clients*

### skills

Onboarding Funnels | Data-Informed Decisions | Cross-Functional Leadership | Client Experience Strategy

### professional experience

ED, Onboarding General Manager | JP Morgan Wealth Management Jan 2022 - present

*Lead onboarding strategy for all investment accounts and channels. Blend direct product ownership and influence-based leadership across 30+ team members to deliver growth and open 100K client accounts per month.*

- Increased client account conversion 25% YoY through structured experimentation and iterative UI optimization
- Delivered 9x increase in fraud-review approvals by rearchitecting end-to-end flow to reduce friction
- Launched a self-directed trust offering that succeeded where others stalled, generating \$1B AUM in 18 months
- Reset roadmap, rebuilt partner alignment, and enabled teams to 2x satisfaction in full-service onboarding in a year
- Collaborated with analytics on event instrumentation to harden funnel monitoring across internal platforms

VP, Digital Product Owner | Online Investing by JP Morgan Apr 2018 - Dec 2021

*Owned backlog and delivery across design, engineering, and operations for online investing account onboarding, joining a startup-phase team operating with autonomy inside JPMorgan's digital organization.*

- Shaped roadmap to achieve product-market fit, resulting in 300K client account openings in first 18 months
- Refined client experience and led product execution from MVP to scaled offering, generating 400K+ accounts/year
- Modernized the stack (Kafka, React) with engineering leads for resiliency; gained fluency in system architecture
- Built delivery rhythm and Agile discipline that continue to shape how I lead, partner and make decisions today

Analyst Associate & VP, Strategic Programs | JPMorgan Private Bank 2010 - Mar 2018

*Executed long-term projects to drive behavior change and operating model shifts for teams focused on ultra wealthy clients. Developed early fluency in analytical approach, product thinking, and stakeholder management.*

- Launched JPMC's first digital mortgage experience, achieving 90% internal adoption in first 3 months
- Migrated 40K clients into case-based, tiered service model, eliminating regional variations without disruption
- Led redesign and testing for internal alerts platform, leading to 30% increase in usage after relaunch

### education

B.S. Economics, Minor in Finance | Syracuse University 2006 - 2010

- Graduate of Renée Crown University Honors Program, Magna Cum Laude & Phi Beta Kappa; GPA 3.84
- Director of UU Performing Arts | Managed \$150,000 budget and produced shows for professional comics