

Jeff Thomas

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Summary

Analytical manager adept at problem solving complex business needs. Critical thinker who analyzes data to employ exceptional applications and process improvements using current programming languages. Levelheaded and calm servant leader who provides vision by using roadmap structures to lead a team forward.

Training & Skills

- Settlement Operations
- Understanding of PorC and 15C3-3
- Reconciliation reporting
- Collecting, cleaning, and transforming data with Python-Pandas Jupyter Notebook
- Build out Dataframes with Pandas and Numpy
- Understanding of Machine Learning concepts and algorithms
- Visualization techniques with Python and Microsoft Power BI
- Product Roadmap Design
- JIRA (Story cards, Kanban, Scrum)
- Agile Frameworks (Scrum, SAFe)
- Software Development (Java, Python, HTML, XML, CSS, SQL)
- MS Office (Word, Excel, Power Point, Access)
- PLDC – Army Primary Leadership Development Course

Education

Bellevue University

Bellevue, NE

Bachelor of Science in Data Science

- GPA 4.0
- Member Omega Nu Lambda

(Anticipated Nov 2023)

Metropolitan Community College

Omaha, NE

Associate of Applied Science in Web & Database Programming

(Nov 2020)

- Dean's List x3
- GPA 3.6
- Member Phi Theta Kappa

Experience

FUTU US Inc.
Director of Operations Control

Palo Alto, CA
(Dec 2022 - Present)

- Lead team of reconciliation analyst
- Ensure books and records are reconciled to depositories.
- Develop new reconciliation reports using python and excel
- Work with IT department on long term reporting needs

Charles Schwab
Senior Product Manager

Omaha, NE
(Oct 2021 – Dec 2022)

- Work with business owners to find value and prioritize new projects
- Lead quarterly PI Planning
- Search for data driven outcomes
- Attend and lead Scrum calls and refinement sessions with the development team

Trade Station Securities
Senior Product Manager

Omaha, NE
(Jun 2021 – Oct 2021)

- Work with business owners to find value and prioritize new projects
- Lead recurring stakeholder meetings on all assigned projects
- Write MBI (Minimum Business Increment) stories
- Participate in cross functional prioritization meetings
- Perform as the lead on UAT (User Acceptance Testing) sign off for assigned projects

TD Ameritrade
Solutions Manager – Product Owner

Omaha, NE
(Apr 2013 – Jun 2021)

- Created the vision and roadmap for the Settlements product team
- Wrote and refined story cards
- Prioritize work to be completed based on value
- Aligned a software development team while building new applications
- Effectively communicated with business partners
- Analyzed current processes for improvement recommendations

Axos Clearing
Settlements Manager

Omaha, NE
(July 2005 - Apr 2013)

- Supervised a team of associates in charge of the firm's equity and bond settlement
- Monitored daily settlement risk reports
- Performed purchase and sales trade break resolution
- Reconciled breaks with the street and handled escalations

- Coached and trained associates to be the best they could be

TD Ameritrade
Settlements Team Manager

Omaha, NE
(Apr 1999 - Jul 2005)

- Delivered on daily settlement obligations
- Maximized process improvements
- Hired and coached new associates

Compass Financial
Commodity Broker

Richardson, TX
(Mar 1996 - Apr 1999)

- Capitalized on revenue by opening and servicing new clients
- Advised clients on trade strategies and quotes
- Corresponded trades to the floor broker

Army National Guard
Sergeant Squad Leader

Irving, TX
(Feb 1990 - Feb 1996)

- Directed a team of combat engineers
- Trained constantly to Army precision
- Prepared for combat escalation
- Served during Desert Storm
- Delegated responsibilities to ensure risk procedures were met

Licenses and Certifications

- Securities Licenses - Series 3, 7, 22, 24, 63 (Active 7,24,63)
- Agile Certifications - Scrum Alliance CSPO, SAFe POPM