

# G R E G W O L F I N G E R , C F A

San Diego, CA USA • +1 (858) 752-8899 • greg@wolfinger.io • wolfinger.github.io • linkedin.com/in/wolfinger

## Finance Senior Director pivoting to follow passion for backend software engineering

<i>skills</i>	Continuous learning is a core principle. I excel at quickly learning things and independent study <ul style="list-style-type: none"><li>• Code: Go, Java, Python, Jupyter Notebook, Git</li><li>• Data: SQL / NoSQL, JSON, protobufs</li><li>• AWS Certified Developer (2023)</li><li>• Cloud: containers, Kubernetes, Kafka, OpenTelemetry</li><li>• Certified Kubernetes App Dev (expected Oct 2023)</li><li>• Frameworks: REST, gRPC, Agile</li></ul>		
<i>courses</i>	Fundamentals of Backend Engineering (Jul 2023)	Fundamentals of Database Engineering (Aug 2023)	
<i>education</i>	MBA, Rady School of Management UC San Diego, 2014	CFA Charterholder CFA Institute, 2009	BS, Information Systems University of Maryland, 2004
<i>professional projects</i>	Broker / Dealer Anti Money Laundering <ul style="list-style-type: none"><li>• Data integration across LPL Financial's trading systems to detect money laundering</li><li>• Solution included bash scripts to automate and integrate across unrelated systems with no APIs and SQL stored procedures to optimize database performance</li></ul>		
	Investment Bank Market Risk Consolidation <ul style="list-style-type: none"><li>• Analyzed VBA macros for JPMorgan trading desks across diverse geographies + financial products</li><li>• Created functional and technical design documents to standardize and aggregate market + credit risk measures</li></ul>		
	Insurance Investments Algorithmic Risk Management <ul style="list-style-type: none"><li>• Technical design and implementation of data ingestion + modeling for \$90B in fixed income, structured products, and derivatives to be used on a market risk software platform</li></ul>		
	Ventures Public Share Exit Model <ul style="list-style-type: none"><li>• Designed and implemented a dynamic, volatility-based model to exit Qualcomm Ventures publicly-listed holdings using Python and Jupyter notebook</li></ul>		
	Treasury Data Warehouses <ul style="list-style-type: none"><li>• Created treasury department data warehouses for Qualcomm and Adobe to improve + automate reporting and optimize P&amp;L + tax impacts from business activity</li></ul>		
<i>personal projects</i>	Varangian: Shopify + AWS of investment management <ul style="list-style-type: none"><li>• Motivation: create an investment platform that focused on generating value for users rather than the platform</li><li>• Tech: Go, gRPC with REST exposed gateway, protocol buffers, Postgres</li></ul>		
	Outcomes: Better data analysis for finance <ul style="list-style-type: none"><li>• Motivation: open source a package to assist with better financial market data and investment performance analysis</li><li>• Tech: Python, Pandas, Numpy, Statsmodels</li></ul>		
	Algos and Algos.Java: Implementation of common algorithms and data structures <ul style="list-style-type: none"><li>• Motivation: implement common data structures and algorithms to solidify comprehension</li><li>• Tech: Go, Java</li></ul>		
	Midtide: Books time on your Google calendar based on Surfline conditions <ul style="list-style-type: none"><li>• Motivation: brush up on Python, learn how to piece unrelated APIs together, and book time for surfing!</li><li>• Tech: Python, Google Calendar API, Surfline API</li></ul>		
<i>personal</i>	Surfing, tennis, social leagues	Music shows & festivals	Motorcycling (toured Vietnam)

**Chronological work experience demonstrating career progression, domain expertise, high stakes responsibility + reliability, and team leadership (managers + ICs) on the following page**

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education	MBA, Rady School of Management UC San Diego, 2014	CFA Charterholder CFA Institute, 2009	BS, Information Systems University of Maryland, 2004
experience	<b>QUALCOMM INCORPORATED</b> San Diego, CA <i>Sr. Director, Treasury &amp; Ventures Finance</i> 2021 – present <ul style="list-style-type: none"><li>Lead a team of 10 (3 managers, 7 ICs) responsible for ops + cash management, FX hedging, investments, and Ventures</li><li>Advise on all aspects of Treasury while developing people managers and junior team member domain expertise</li><li>Work closely with legal, tax, accounting, and BU teams on legal entity structuring, cash pooling, M&amp;A integration, etc.</li><li>Assist Ventures team with finance support, equity portfolio risk, and exiting publicly-listed positions</li></ul> <i>Director, Corporate Financial Planning &amp; Analysis (FP&amp;A)</i> 2019 – 2021 <ul style="list-style-type: none"><li>Led a team of 7 (2 managers, 5 ICs) responsible for consolidations, outlooks, earnings, and long-range planning</li><li>Board financial reporting including drafting CFO and Finance SVP correspondence</li><li>Developed high performing analysts who were highly sought after by internal teams for future rotations</li></ul> <b>ADOBE SYSTEMS INCORPORATED</b> San Francisco, CA <i>Sr. Manager, Finance</i> 2017 – 2018 <ul style="list-style-type: none"><li>Oversaw \$6bn investment program, capital policy &amp; structure, capital markets, and board reporting</li><li>Designed P&amp;L model to forecast, analyze and explain key performance drivers in a SaaS framework</li><li>Created a data warehouse for analysis &amp; reporting of investments, FX hedging, and debt</li></ul> <b>42 VOYAGER LLC</b> San Diego, CA <i>Founder</i> 2016 – 2017 <ul style="list-style-type: none"><li>Developed a fundamental global macro investment strategy</li><li>Open sourced Python code that generates investments analytics and performance</li></ul> <b>QUALCOMM INCORPORATED</b> San Diego, CA <i>Director, Treasury &amp; Capital Markets</i> 2015 – 2016 <ul style="list-style-type: none"><li>Worked with senior &amp; executive management to formulate strategy; built capital markets function from scratch</li><li>Designed + executed \$4bn revolver &amp; commercial paper program, \$10B debt IPO incl. \$4B of locks &amp; swaps</li><li>Structured and repurchased \$12B+ of stock incl. a \$5B accelerated share repurchase (ASR)</li><li>Assisted Treasurer w/ managing banking, rating agency and credit investor relationships</li></ul> <i>Sr. Manager, Corporate Financial Planning &amp; Analysis (FP&amp;A)</i> 2014 – 2015 <ul style="list-style-type: none"><li>Created bottoms-up models to value individual BUs and total company</li><li>Generated peer &amp; competitor intelligence for a variety of mobile + adjacent technology markets</li></ul> <i>Sr. Analyst &gt; Manager &gt; Sr. Manager, Treasury Investments</i> 2010 – 2014 <ul style="list-style-type: none"><li>Investment program strategy and asset allocation for a \$30B+ multi-asset class portfolio</li><li>Produced and presented macroeconomic outlook to CEO, CFO, and EVPs</li></ul> <b>ACCENTURE PLC</b> San Diego, CA <i>Management Consultant, Financial Risk Management</i> 2007 – 2010 Clients included Shell Trading, JPMorgan, Credit Suisse, and Allstate Investments <ul style="list-style-type: none"><li>Led 8-person team to redesign front office &amp; risk control processes for trading 7.5M barrels/day of oil</li><li>Analyzed market risk framework for credit, rates, and FX trading desks globally</li><li>Analyzed &amp; redesigned the workstreams of 12 asset management desks with \$215B in AUM</li><li>Modeled \$90B of fixed income, structured products and derivatives for valuation and risk analysis</li></ul> <b>INFORMATICA CORPORATION</b> San Diego, CA <i>Analyst &gt; Consultant &gt; Sr. Consultant, Professional Services</i> 2004 – 2007 <ul style="list-style-type: none"><li>Built data integration &amp; analytics capabilities for Technology, Media, &amp; Financial Services clients</li></ul>		
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