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Summary

Innovative and astute technology and leadership professional with a proven track record of building strong self-managing technical teams and leading successful projects that deliver high quality results on time and under budget. Strategic thinker proficient in capital markets technology and committed to identifying and leveraging opportunities for growth.

Qualifications Summary

* *Highly skilled at technical risk management and implementing best practices for IT development and operations*.
* *Strong communicator adept at establishing relationships, effective stakeholder management, presenting to C-Suite executives, and equally comfortable translating business objects into technical deliverables and vice-versa.*
* *Team-oriented problem solver proficient at dealing with underlying technologies and quick to learn new ones*.

# Career Experience

Genesis Global, Miami, FL Jun 2021 – Oct 2021

Senior Client Delivery Lead

Created recruitment pipeline and facilitated the onboarding of external recruiters and ensured the internal recruiters were representing Genesis properly in the marketplace. Mentored on implementing a robust Agile practice across various regions and provided coaching on Agile principals and well as Scrum roles. Analyzed the current software development practice and developed a plan to implement best practices across the development teams. Assisted the sales engineering team with platform modifications and created POC’s to win new business. Met with Wealth Management clients to capture requirements for product enhancements and provided an estimate on the work effort to implement the changes.

GBC Inc., New York, NY Aug 2018 – Jun 2021

Consultant

Provided information systems and services management expertise and guidance on evaluating software systems, environments, and buy vs. build decisions applicable to a start-up business. Advised on initial sizing, structure, outsourcing, and risk minimization of IT organization as well as on strategy to scale technical capabilities and to protect IP. Gave guidance on best practices for implementation of a robust SDLC pipeline/processes utilizing Agile methodologies. Authored business continuity plan to protect data in the event of a natural disaster or catastrophic outage.

* *Oversaw multiple projects to build IT operational functions and make process improvements.*

Stone Ridge Asset Management, New York, NY May 2016 – May 2018

Project Management Specialist Consultant

Delivered technical leadership to firm managing $16B in assets and served as Scrum Master for five different development teams. Executed project management on the launch of two new equity portfolio funds (factor tilted) and a new business line accounting for $6B assets under management. Ensured organizational transparency through robust and accurate status reporting for Senior Management.

* *Reorganized the technology team to align developers with portfolio managers instead of in a technology pool.*
* *Instituted a Project Management framework and a robust Agile practice including deployment of supporting software.*
* *Executed external vendor management identifying delivery risk and validating that vendors met commitments.*

Global Equities Technology, RBC Capital Markets, New York, NY Apr 2014 – Feb 2016

Director

Directed all technology teams supporting the Front Office OMS, UI, and related middleware and provided stakeholder management for the Global Heads of Equities Trading and senior bank executives. Generated key reporting and critical information regarding corrective actions and improvements aiding senior leadership in the executive decision-making process. Ensured proper cost allocation, project budgets remained on plan, and supplied guidance to PMO/CFO. Instituted Agile methodology for four teams that were previously using Waterfall SDLC. Resolved issues with and stabilized problematic legacy middleware components.

* *Saved a critical client migration project (five previous PMs failed) that spanned 16 months, completed the project $250k under budget, and enabled RBC to write down $90M in goodwill.*
* *Attained an uptime for OMS of more than 99.999% through the establishment of disciplined software development and release practices.*
* *Created a 4x performance improvement of the UI used by the Sales Traders and Support staff.*

Global Equities/Futures Technology, RBC Capital Markets, New York, NY Feb 2010 – Apr 2014

Consultant

Performed multiple roles from overseeing UI Development to running Futures Technology. Delivered product, project, and stakeholder management expertise for the front office trading UI and support tools. Reestablished positive relationships with Front End UI stakeholders frustrated by the lack of technical deliverables. Facilitated change in technical leadership which had become a bottleneck and supplied new features confirming proper implementation in the strategic UI. Instituted disciplined development procedures validating adherence to best practices and enabling end-to-end traceability of software releases.

* *Turned around development effort for eliminating the risk of unauthorized Front End UI trading functions by engineering an entitlement system and access controls as well as developing rigorous deployment processes.*
* *Architected a low cost and low risk algorithmic Futures Electronic Trading platform for the futures team.*
* *Streamlined the Futures Front Office functional workflows, enhancing the technical capabilities, and eliminating a $90K annual software license.*
* *Recovered an overdue (one year late) development effort for the strategic UI for Electronic Sales Trading Desk.*

Trading Technologies Development, FXall, New York, NY Jun 2006 – Mar 2009

Senior Director / Director

Supplied technical direction for FXall's relationship trading platform accounting for 6 different products and over 90% of the firm's revenue. Directed a staff of over 40 on-shore and offshore Java developers supporting and maintaining all the front, middle, and back-office systems. Effectively completed strategic projects on schedule leveraging component architecture and focused product delivery.

* *Turned around a major settlement project (delayed by two years at a critical juncture after the Lehman collapse), preventing the loss of one of their largest clients.*
* *Refactored front and server-side components to use component-based architecture which allowed for faster implementations and the ability to attract new business.*
* *Reinvented the white label version of FXall's flagship product (which was delayed over a year) allowing retention of one of the largest client accounts.*
* *Rebuilt a team of 10 struggling developers guiding them to greatly improve the reliability and stability of releases and software builds as well as reducing major/critical outages by a factor of 5. Eliminated staff turnover (previously 40%).*

Java Technologies, Chicago Stock Exchange Inc., Chicago, IL Jan 2004 – Jun 2006

Manager

Oversaw all Java based platforms at the Chicago Stock Exchange including all trading UI's, Order Management System, Order Router, and middleware for a new REG-NMS compliant trading system. Interacted with Heads of Firms, Specialists, Brokers, and Board Members, and acted as technical liaison between the traders on the floor and the technology group.

* *Drove creation of scalable, component-based Reg NMS compliant OMS, order routing system, and container-based Market Regulation Surveillance System.*

OTC Trading Technologies, Chicago Stock Exchange Inc., Chicago, IL May 2001 – Jan 2004

Manager

Acted as technical subject matter expert on NASDAQ's Exchange transition and led a staff of five performing technology operations support and maintenance.

* *Built a new trading model removing the dependency on NASDAQ and enabling CHX to route orders to other markets and leverage our negotiating power (lower costs) with NASDAQ.*
* *Drove integration of a third-party ECN Consolidator and Smart Order Router into the Exchanges proprietary trading system to allow trading access to additional trading liquidity.*

# Education

**Global-EMBA –** London Business School London, England

**Global-EMBA – C**olumbia Business School New York, NY

**Bachelor of Science - Computer Science** (Highest Honors), DePaul University Chicago, IL

# Patents

*Verification of Data Processes In a Network Of Computing Resources.*

Walter Michael Pitio, Philip Iannaccone, James Brown, Jeffrey Roy Betten, Mitchell Joseph, Aiosa Morris. 2015.

US Patent Application 10284462. Granted May 7th, 2019