Bill Seery

Boca Raton, FL
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Dear Hiring Team,

I am writing to express my interest in opportunities where I can contribute through my background in **finance, accounting, operations, insurance, project management, and systems implementation**. With experience across startups, global enterprises, and regulated industries, I bring a practical, results-oriented approach to solving business challenges and optimizing performance.

Throughout my career, I've led end-to-end initiatives across these domains—driving process improvements, managing compliance, and aligning technology solutions with business goals. My experience includes **underwriting, structured finance, financial reporting, operational automation, and CRM/ERP system deployments**, all supported by strong project management capabilities.

Key Qualifications:

- **Finance & Accounting:** Managed structured portfolios, led financial modeling and reporting, and automated accounting processes for accuracy and speed.
- **Operations & Compliance:** Developed internal control systems aligned with **SOX**, **ICFR**, and audit requirements across insurance and finance environments.
- **Insurance & Underwriting:** Designed and executed underwriting strategies, structured reinsurance solutions, and authored the *Commercial Insurance Overview* guide.
- **Project Management:** Oversaw full project lifecycles—scoping, budgeting, team leadership, and vendor coordination—across IT, finance, and operations.
- **Systems Implementation:** Led successful integrations of **CRM, ERP, AI, and RPA** tools to streamline workflows, enhance data accuracy, and reduce manual effort.
- **Cross-Functional Collaboration:** Worked with executive, actuarial, legal, and technical teams to execute projects and meet strategic objectives.

I bring a strong startup mindset, a focus on execution, and the ability to bridge technical and business priorities. I would welcome the opportunity to contribute to a high-performance team and deliver value from day one.

Thank you for your consideration.

Sincerely,

Bill Seery

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wsseery@gmail.com   -   [Work Portfolio](#)

Professional Profile

Results-driven technology professional with extensive experience in **technology project management, digital transformation, and process automation**. Proven expertise in **system integrations, finance system solutions, compliance, and IT governance**, with a strong track record of leading **cross-functional teams to implement scalable technology solutions**. Adept at managing **full project lifecycles from initiation to execution**, leveraging **AI, RPA, CRM, and cloud-based technologies** to enhance operational efficiency. Excels in **stakeholder communication, risk management, and regulatory compliance** to ensure alignment with business goals.

Core Competencies

- **IT Project Management & Strategy** – Full project lifecycle execution, scope analysis, budget management, and strategic IT planning.
- **Digital Transformation & Process Automation** – Implemented **AI, RPA, CRM**, and ERP solutions to enhance operational efficiency.
- **Technology Integration & System Optimization** – Expertise in **CRM (Salesforce, HubSpot, Zoho), cloud platforms, API development, and ETL pipelines**.

- **Finance System Solutions & Compliance** – Experience with **ICFR, ITGC, SOX compliance**, and internal controls implementation.
- **Cross-functional Leadership** – Managed IT initiatives across **finance, insurance, operations, and marketing departments**.
- **Technical Documentation & Reporting** – Developed **process workflows, system documentation, and risk analysis frameworks**.
- **Vendor & Stakeholder Management** – Led negotiations and managed relationships with **third-party vendors, IT teams, and executive leadership**.

Relevant Professional Experience

ALPHAGEN LLC AND ALPHAGEN INSURANCE AGENCY, BOCA RATON, FL - *Principal - 2013 - current*

- Managed **end-to-end IT projects**, integrating **CRM, AI, RPA, and process automation tools** to enhance business operations.
- Led the implementation of **digital underwriting platforms**, improving risk assessment and underwriting accuracy.
- Designed and executed **finance system automation**, reducing manual processing time by **40%** and improving reporting accuracy.
- Spearheaded **compliance initiatives**, ensuring adherence to **SOX, ICFR, and IT governance** best practices.
- Developed **technical documentation, dashboards, and workflow automation tools** to optimize business processes.

- Partnered with **third-party vendors and IT teams** to enhance system functionality and cybersecurity measures.

LongevityTech.fund, Systems & Business Operations Consultant, Boca Raton, FL, 2022 – 2024

- Led **IT system integrations** for investor relations, CRM, and financial data management.
- Developed **automation workflows** for investor outreach and data analysis, reducing manual data entry by **60%**.
- Managed cloud-based solutions for **fund administration and compliance tracking**.
- Created **risk management frameworks** ensuring financial and regulatory compliance.

JVB Financial Group, Marketing and Systems Manager, Boca Raton, FL, 2011 – 2013

- Managed **IT-led system enhancements** to improve trading operations and financial reporting.
- Developed **customized CRM solutions** to streamline sales tracking and customer engagement.

Allianz - Allianz Risk Transfer (ART), Managing Director, New York/Zurich, 1999-2009

- Led **IT system development for underwriting, risk assessment, and capital markets transactions**.
- Designed and implemented **risk management software and data automation tools**.
- Oversaw **digital underwriting platform integrations**, optimizing pricing analytics and financial modeling.

Citigroup - Systems Design & CFO Project Management Team, New York, NY, 1994 – 1999

- Developed **underwriting technology and financial models** for structured credit transactions.
- Designed **IT systems and databases** for asset-backed commercial paper tracking.
- Created **SaaS-based investment analysis tools**, improving financial decision-making.

Education

New York University - New York, NY

Bachelor of Arts – Computer Science / Economics Minor

Additional Skills

- **Project Management** – Agile, Scrum, Waterfall methodologies, PMP principles
- **CRM & Business Platforms** – Salesforce, HubSpot, Zoho, Agile CRM
- **Data Analytics & Automation** – AI, RPA, ETL, KPI dashboards, SQL, Python, API integrations
- **Finance & Compliance** – SOX, ICFR, ITGC, financial reporting automation
- **Cloud & Infrastructure** – AWS, Azure, Google Cloud, SaaS implementation
- **IT Governance** – Risk management, internal controls, compliance frameworks