

Charles Haumesser

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Professional Summary

Strategic and analytical professional with 10+ years of experience in finance, risk management, and digital product analysis. Proven success in streamlining operations, implementing vendor systems, and using data-driven insights to improve customer experience. Adept at cross-functional collaboration, agile methodologies, and leveraging tools like Power BI, and Jira.

Professional Experience

Digital Product Analyst Five Star Bank – Williamsville, NY | May 2025 – Present

- Drive product strategy using data insights to enhance digital banking platforms and user experience.
- Collaborate with UX/UI designers, developers, and stakeholders to deliver solutions aligned with business objectives.
- Utilize agile frameworks for user story development, A/B testing, and product iteration.
- Translate complex data into actionable insights to improve product performance and customer satisfaction.

Project Coordinator Universal Property & Casualty Insurance – Fort Lauderdale, FL | Oct 2023 – Nov 2024

- Led implementation of “VIP” automated vendor payment system, reducing manual reviews and increasing invoice accuracy.
- Designed and delivered vendor training programs to ensure smooth onboarding and adoption.
- Acted as SME for “VIP,” coaching analysts and managing rollout success.
- Developed Power BI dashboards for executive-level visibility into vendor payment performance.

Operational Risk Intermediate Analyst Citigroup Inc. – Tampa, FL | Nov 2021 – Oct 2023

- Performed full-cycle risk assessments and implemented Corrective Action Plans (CAPs) to close control gaps.
- Partnered with control officers to maintain governance frameworks and ensure regulatory compliance.
- Logged and tracked technical issues in Jira to support process improvement and system enhancements.

Fixed Income Analyst II M&T Bank – Buffalo, NY | May 2017 – Oct 2021

- Managed collateral operations, ensuring proper market and par value alignment.
- Executed trade validations, reconciliations, and regulatory audit documentation.
- Facilitated cross-functional training and developed escalation workflows.

Operations Specialist III / VI First Niagara / KeyBank – Amherst, NY | Jul 2015 – May 2017

- Led compliance initiatives for FEMA flood insurance across loan portfolios.
- Headed cleanup project to align legacy accounts with federal insurance regulations.
- Reviewed loan documentation for OCC audits to ensure regulatory accuracy.

Operations Support Representative III Citigroup Inc. – Getzville, NY | Jul 2013 – Jul 2015

- Maintained integrity of financial pricing and reference data.
- Oversaw security setup for major market events and data transitions.
- Ensured accuracy of master databases under evolving data governance standards.

Education

Bachelor of Science in Economics & Finance

State University of New York, College at Buffalo — May 2013

Certifications

- Foundations of Project Management – Google (Mar 2025)
- Business Analysis & Project Management – Coursera (Jul 2024)
- Data Analysis & Visualization Fundamentals – IBM (Mar 2024)
- Corporate Finance – ColumbiaX (May 2020)

Technical Skills

Data Analysis & Visualization: Power BI, Excel (PivotTables, Power Query), Tableau

Project & Product Tools: Jira, Agile/Scrum, A/B Testing, User Stories

Risk & Compliance: Risk Assessment, CAPs, Regulatory Compliance (OCC, FEMA)

Product Management: User Experience (UX/UI) Collaboration, Roadmapping, Vendor Systems (VIP)

Communication & Reporting: Executive Dashboards, Stakeholder Presentations, Training & Onboarding