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SUMMARY

Accomplished Project Manager and Business Analyst functioning in all phases of the Project Lifecycle from Initiation through Implementation. Also experienced in the role of Quality Assurance Analyst in a variety of large and medium scale financial environments. Strong communication and people skills.

PROFESSIONAL EXPERIENCE:

Independent Consultant   2009–Present
A series of IT Analysis and Design jobs for firms in my area

Volunteer Activities
ASQ Long Island: Member of the Executive Board (Website Chair)
PMI NYC: Corporate Outreach Event Team Member
PMI LIC: Member

PMP Certification is up to date.

Merrill Lynch, New York, NY - Assistant Vice President   2002–2008

Project Leader/Business Analyst for the Domestic Prime Brokerage System. The system provides services for large Enterprise clients, with hundreds of billions of dollars under management. Liaised directly with the Business Department head, Client Reps, and Client Take-on staff. Prepared project phase documents. Determined the stakeholders for each project, determined business needs, and reported progress to them. Interfacing directly with clients was also a requirement. Team members were tasked, supervised and scheduled. Provided primary support for both Domestic and Global Prime Brokerage Systems.

Hardware/Software environment: Windows Servers using Visual FoxPro and SQL Server; Solaris Server using Oracle, Crystal Reports; IBM Mainframe using MVS, CICS, JCL, DB2, and Cobol; SharePoint, PowerPoint, Visio, MS Project, MS Office.

Sampling of Projects led:
- Significant changes to the Securities Lending/Interest Sharing (Security Hard to Borrow) system. Changes resulted in significant increase in client revenue.
- Major revision of the Trade Capture System. Increases in automation and flexibility resulted in significant time savings for the Client Reps.
- Revisions of both the Trade Match and Trade entry processes.
- Conversion of about 200 Batch, CICS, and DB2 programs in 2 systems from Cobol II to zOS Cobol. This was mandated when IBM dropped support of the legacy compiler.
- Revision of a Report Selection System. All options, Client Family, Account, report/data type, delivery point are screen selectable by user thereby simplifying use. Significant time savings for Client Reps.
- Several revisions to the Monthly Client Journal System. Initial change was implemented for risk reduction for problematic month end processing. Later changes extended the automation to mid-month adjustments to improve the timeliness and accuracy of these data. Also satisfied business need for Client Reps to have access to historical data.
- Internal project in response to production needs: Notification of development staff if the production job stream is delayed. Management reports are generated that provide estimates of when the stream will be completed. Historical accounts of processing timeliness were provided periodically. This became the impetus for changes to upstream systems so that Service Level Agreements could be met.

Goldman Sachs: Asset Management/PCS, New York, NY - Consultant   1995–2001
Provided Business Analysis of stakeholder needs. Provided analysis and design for in-house enhancement to several vendor supplied systems. (Systems include Portfolio Accounting, Performance Measurement and trading systems.) Liaised with the head of the business unit and the vendors. Was responsible for coordination of effort with other development teams. Programmers were tasked, supervised and scheduled.

Hardware/Software environment: Sun UNIX Servers using Perl, SQL Server, and C++; IBM Mainframe using MVS, CICS, JCL, and Cobol.

- Migrated one portfolio performance system to another. Designed a cross platform system that compared portfolio performance data on the two systems. Also designed the data feed from the old system to the new.
- Provided analysis and proposed enhancements for the two-way exchange of data between the Merrin Equity Trading System and the Invest1 Securities Accounting System.
- Installed and provided production support for several versions of SunGard's Invest1 (Securities Accounting) and Superf4 (Portfolio Performance) Systems. Analysis of the system resulted in many in-house add-ons, as well as proposed enhancements that were implemented by the vendor.
- Provided analysis and design of three subsystems that automated the addition of accounts and sub-accounts to the Superf4 Performance system.

Lipper Analytical Services, New York, NY - Consultant
Developed computer based products for use by the firm's clients in close conjunction with the firm's principal, A. Michael Lipper. Involved in the business analysis, system design, specification, and implementation phases of all products. Prepared both user and system documentation. Also supervised programmers working from my specifications. All systems generated revenue producing products. Some projects were as follows:
- LANA: The company's first PC based product. Developed using several connected projects. Managed the portion of the initiative that gathered data from in-house databases and transformed the data to the format needed for client mailboxes.
- Money Magazine: Mutual Fund data published quarterly. Played the roles of Project Manager and Business Analyst.
- L-MFPA: Company's flagship product. Responsible for projects that resulted in several major changes.
- Expanded data: Responsible for a project that expanded the database from Monthly and Weekly data points to one that supported daily data as well.

EDUCATION
P.D.   Psychology, Saint John's University
M.A.   Psychology, The New School for Social Research
B.A.   Psychology, Brooklyn College

Recent courses
- Actively pursuing ACP certification.
- Ongoing courses in Project Management to maintain PMP certification.
- Courses in Business Analysis
- Courses in C#, SQL Server, MySQL, and PHP