

Finance Resume – Experienced

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SUMMARY M.B.A. in Finance with 12 years business analysis/applications development experience in major financial services firms, maintaining a balanced mix of business and technical knowledge.

EXPERIENCE

Aug. 1998 – Present **CREDIT SUISSE ASSET MANAGEMENT** New York, NY
Assistant Vice President - Team Leader Portfolio Accounting and Reference Data Applications
Main IT Business Contact – Tokyo Portfolio Integration into NY Accounting System

- Managing a team of three developers to provide the necessary modifications for the integration of Tokyo Accounts into the NY based portfolio accounting system including modifications to vendor pricing feeds, custodial interfaces, nighttime batch cycles to support additional time zones.
- Modified the portfolio accounting system to segregate account information by CSAM Company. This modification enables the application to determine what data users may have access to.

NY IT Project Manager - Global Security Reference Data Management System

- Gathered requirements from global business users for a common platform to integrate reference data across global offices.
- Conducting search for application solution for Global Security Master core product implementation.
- Conducting analysis of connectivity requirements for multi-system/platform environment.

Main IT Business Contact – NY Security Master

- Served as primary liaison between development staff and end-user community.
- Gathered requirements from business users for Domestic and International Equity installment of Security Master.
- Managed a team of three developers to develop a Web Based Security Master in Java/Weblogic/Oracle, which was integrated with the Bloomberg API to facilitate automated data gathering and security creation on the database. The Security Master was also integrated with NY accounting and trading systems.

Main IT Business Contact – Reference Data

- Developed an application that integrates Bloomberg's API information with CSAM's portfolio accounting system. This automated the creation of new securities for traders dramatically increasing trade throughput.
- Re-Engineered CSAM's Security Master maintenance process by re-evaluating vendor data feeds to better automate data maintenance, which dramatically increased the operations group productivity. This involved gathering vendor data via FTP scripts and developing programs to parse and load the data.
- Developed and maintained an application to perform near real time pricing and security related changes to one global trading system and three investment accounting systems.
- Maintained constant contact with end user business community in order to coordinate testing and to ensure feasibility of security master database changes with respect to internal and external reporting requirements.

Feb. 1998 - July 1998 **ERNST & YOUNG LLP** Lindenhurst, NY
Senior Programmer/Analyst – Corporate Data Warehouse

- Developed Oracle PL-SQL programs and Unix Shell scripts to extract consultant time by engagement from the front-end engagement tracking system and import the data into a Data Warehouse.
- Participated in the initial design of the Data Warehouse database schema.

Feb. 1996 – Feb. 1998 **MORGAN STANLEY & CO.** Brooklyn, NY
Associate – Morgan Stanley Trust Company FX/Cash Management Systems

- Responsible for the two way transfer of data between the Mainframe systems and the Unix based front end trading system. Facilitated via Mainframe JCL scripts, Adabase Natural programs, Unix Shell scripts and Sybase stored procedures.
- Developed an application that automatically generates FX transactions for client security trades in foreign currencies and imports the system generated trades to the front end trading system for execution by the FX desk. Dramatically increased the profitability of the MSTC FX desk.

June 1992 - Feb. 1996 **PAINWEBBER INC.** Weekhawken, NJ
Senior Programmer/Analyst - Client Statement Systems

- Developed an application to allow clients to customize their monthly statement.
- Created a process to identify high net worth clients and prioritize the mailing of these statements.

Nov. 1989 - Feb. 1995 **DJ OFFICE CLEANING - Owner** Elmont, NY

EDUCATION **FRANK G. ZARB SCHOOL OF BUSINESS, Hofstra University, Hempstead, NY**
May 2005 M.B.A. in Finance G.P.A.: 3.94
August 1993 **BARUCH COLLEGE, C.U.N.Y., New York, NY**
B.B.A. - Computer Information Systems

COMPUTER SKILLS *Platforms* - Unix, Windows NT *Database Server:* Sybase, Oracle, SQL-Server
Programming Languages C, C++, SQL, PL-SQL, UNIX Shell Scripting, Perl, Java, Weblogic, Cobol, OS/JCL, Adabase Natural

ADDITIONAL Bloomberg Terminal, Bloomberg Excel Add-In, Bloomberg API, Bloomberg Data License