

A. ANAI

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Entrepreneurial financial services leader with extensive UX, Technical PM and Solutions
Architecture experience across startup, agency, enterprise and public-sector client groups.

LEADERSHIP EXPERIENCE

- 12 years: 0-to-1 Ventures Strategy - Product Discovery, Customer Research, Market Validation, Prototyping, Agile PM, GTM Strategy
- 12 years: Design, UX Leadership, Frontend Engineering – UI/UX Design, Ops, Content Design, Design Systems, Customer Experience, Service Design, UI Tools
- 10 years: Technical Product Management – Vision, Business Intelligence, Market Strategy, PRDs, Technical Docs, XFN Roadmaps, Prioritization
- +8 years: Solutions Architecture - Open Source, Data Modeling, APIs, Data Pipelines, Search, DevOps, OAuth, Payments, CMS
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INVESTMENT BANKING, PRIVATE EQUITY

+ 7 YEARS

Global Capital Markets Analyst (Investment-Grade Debt & Derivatives, U.S. Energy, Power & Utilities)

Morgan Stanley
2006 - 2008

- 1. From origination to syndication, lead analyst on +15 transactions ranging in size from \$100M to \$2.25B across all fixed-income.
 - 2. Worked closely with IBD, Fixed Income, Project Finance, and Commodities to develop financing and risk management solutions tailored to the unique capital structure, regulatory, environmental, and commodity-linked issues facing Energy and Utility companies.
- Select Transactions:
- Weatherford International (WFT) \$1.5B, 3-tranche debt financing – Advised on recapitalization strategies and bridge loan financing.
 - Valero Energy Corp (VLO) \$2.25B, 2-tranche debt financing – Advised on accelerated Share Repurchase program and change-of-control.

Equity Research Associate (Global Energy Team, Oil & Gas, Exploration & Production)

- 1. Authored and published original investment research for small and mid-cap E&P stocks with overlapping coverage of large-cap names.
- 2. Built advanced proprietary models, data pipelines and programmatic forecasting tools to support internal due diligence, evaluate investment perspectives, anticipate earnings sentiment and analyze industry data and trends. Led investor relations engagements, editorial reviews, publishing oversight and extensive technical industry analysis including macro-economic and commodity forecasting.

Investment Associate (Global Energy, Mining & Infrastructure Division)

The World Bank
International Finance
Corporation (IFC)
2008 - 2011

- 1. Structured and executed +\$2B in investments across LatAm, the Middle East and North Africa.
 - 2. Co-led all aspects of IFC's investment process and lifecycle from project development to disbursement, including annual deal sourcing initiatives and authoring official memos for IFC's Investment Committee and the World Bank Board of Directors.
 - 3. Led extensive financial and operational due diligence (onsite) while supporting all aspects of deal structuring, term sheet negotiation, legal documentation review, syndication, ESG advisory and transaction-related corporate restructurings.
- Select Transactions:
- Kosmos Energy \$750MM Project Financing (Ghana) – Financing development of Ghana's largest oil discovery to date.
 - Queiroz Galvão \$500M Project Financing (Brazil) – Supported a \$174Bn offshore drilling campaign (Petrobras).

Investor, Venture Capital Associate

Independent
2011 - 2013

- Advised investors and startups in the deployment and fundraising of +\$25M in capital ahead of pivoting to a product agency model.

SOLUTIONS ARCHITECTURE + 0-1 PRODUCT DEVELOPMENT (AGENCY)

+ 7 YEARS

Solutions Architect, Early-stage Ventures (UX and Frontend Engineering)

Wildfyre
(Agency)
2013 - 2016

- 1. Areas of expertise included market sizing, revenue viability, financial modeling, pro-forma valuation, term sheet negotiations, deal
- 2. Areas of expertise included market sizing, revenue viability, financial modeling, pro-forma valuation, term sheet negotiations, deal structuring, business model evaluation (B2B/B2C), fundraising strategy and investor presentations. Self-taught 'Designer-coder', across

Solutions Architect (Open Source)

Open Ventures
(Agency)
2016 - 2018

- Led private and public sector clients in the adoption of modern Open Source architectures and human-centered design practices. Worked closely with teams to drive organizational change management (OCM), operationalize Agile methods and frameworks, establish
- Select Projects:
- Engineer Research and Development Center (ERDC) – Led the organization's first Ruby on Rails project; developed internal protocols and compliance measures for use of Github, Ruby, Capistrano and Bootstrap representing cost savings of +\$25K.
 - USACE Navigation Data Portal – Led React.js, Elasticsearch Nivo Charts (D3, React.js) and Figma adoption for a proof-of-concept evaluation of a multi-year +\$20M data warehousing overhaul being proposed by the U.S. Army Corps of Engineers.

Agency Partner (Content Development, Design and UX Engineering)

Design For Impact
(Agency)
2018 - 2020

- Led efforts across: (1) Design, (2) Product, (3) Film+Photography and (4) Content Development with a social impact ethos, centering on authentic storytelling and development of creative IP. Built an international talent network and deep experience in creative production, agency management and development of extensive asset libraries.

UX ENGINEERING + TECHNICAL PRODUCT MANAGEMENT (ENTERPRISE)		+4 YEARS
Enterprise User Experience Architect (ElasticSearch, ESRI, ArcGIS)		Acuity International 2020 - 2022
- Recruited to lead the UX redesign, data architecture overhaul and commercialization of a suite of Cost Data and Engineering products. - Generated a +\$30M pre-sales pipeline by leading continuous 6-week co-design sprints with private sector and Federal client groups to refine customer segment differentiation, identify nuanced switching costs, and prototype solutions to prioritized customer pain points. - Led sprints to address legacy code quality and poor UI implementations including CSS reconciliations, a Bootstrap 4 migration, AG Grid re-configuration and Angular.js component refactoring resulting in improved user story estimation, sprint completion rates and QA KPIs. Noteworthy Wins: - Partnered with Engineering to achieve search performance improvements of 100X while reducing cost +25% by pivoting our legacy data architecture and strategy from Microsoft Azure Data Factory to the Elastic "ELK" Stack, Microsoft AzureSQL and Node.js APIs.		
UX Design and Engineering (FalconX360 Trading Platform)		FalconX 2022 - 2024
- First UX hire; enabled market-leading speed for 0-1 product development across +10 Product Managers and cross-functional leads. - Operationalized UX within the organization by implementing a DesignOps stack (ClickUp, Figma, Miro, Zeplin, FullStory), initiating cross-functional agile planning, scaling the team from 1 to 4 designers across U.S. and India and standardizing adaptive UX workflows. - Significant involvement in the delivery of net new (0-1) products for core business verticals (i.e. Trading, Portfolio, Credit, Derivatives), as well as executive-sponsored initiatives for Content Standards, Customer Experience, Customer Support, Web and Brand Strategy. Noteworthy Wins: - Partnered closely with Engineering, Product Marketing, Institutional Sales, TradeOps and Strategy teams on end-to-end development, strategy and release of FalconX360, the first institutional prime brokerage platform supporting digital assets (Finnovate Award, 2022).		
CONSULTING + ADVISORY		
Advisor, Technical Product Manager		Vertalo 2021 - 2022
Worked directly with the CTO and VP of Engineering. Developed a cross-functional prioritization model to balance (tactical) customer retention and (strategic) product evolution roadmaps and monetization of investor First-party Data Rights.		
Venture Advisor, AI Solutions Architect		Independent 2024 - Present
- Lead venture and enterprise clients in the development of Analytics, Automation and Augmented Intelligence (A3) capabilities. - Drive efforts to enhance business intelligence outcomes, accelerate 0-1 product/software development and explore end-to-end AI/ML investment and innovation. Focus: AI Strategy, Data Governance, AutoML, Open Source LLMs, Agentic AI, Adv. Prompt Engineering. Select Projects: (NDA Applicable) - Project A– AI-powered tax transcript analysis tool packaged as an interoperable web service for B2B/B2C: led (1) exploratory/generative research, (2) SWOT/opportunity sizing (3) AI strategy (3) technical strategy – AI/Data/Web stack, data modeling and MVP development. - Project B – Next-gen wealth platform democratizing access to alternative private markets: advised on (1) Series A fundraising strategy, (2) reimaged AI Design workflows and patterns, and (3) revamped Figma configuration and DesignOps stack to accelerate design delivery.		
Advisor, UX Engineering and Ecosystem Growth (Core Team)		PersonalDAO (\$DAO Coin) Apr 2025 - Present
Addressing the challenge of driving localized ecosystem growth in underbanked and/or developing financial markets via "invisible blockchain" UI, enhanced accessibility for low-latency, Web3.0/mobile payment integration, and decentralized app communications.		
EDUCATION + SKILLS		
Bachelors of Science (BSc), Economics	University of California at Berkeley	
NCAA Division I Collegiate Athlete (PAC-12 Conference, All Academic)	2001 - 2006	
AI Engineering	University of Illinois-Champaign, Department of Economics	
Artificial Intelligence in Wealth Management	Wharton, University of Pennsylvania	
AI for Business Specialization	The Fuqua School of Business, Duke University	
AI Product Management Specialization	EDHEC and Société Générale	
Global Financing Solutions	Corporate Finance Institute (CFI)	
Preparatory Certificate in Finance and Financial Markets	Corporate Finance Institute (CFI)	
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Preparatory Certificate in Finance and Financial Markets	Corporate Finance Institute (CFI)	
Design, UX, Product	Adobe CS, Figma/Figjam, Miro, Jira/Confluence, Github/Zenhub, ClickUp	
Analytics, BI	GA4, Amplitude, Mixpanel, Tableau, Power BI, MS Excel, Domo, Splunk, Hotjar,	
Data Science, Programming	SQL, R, Python, Ruby, JavaScript, Command Line Tools/Git,	
No-Code, Web, Application Development	Webflow, Framer, Node.js, Next.js, React.js, Vue.js, Rails, HTML5, CSS3, D3	
Machine Learning	LangChain, Hugging Face, Zapier, Make, Scale AI, Open AI, ElasticSearch	
Gen. AI	ChatGPT, Claude, Gemini, Grok, DeepSeek, You.com, Cursor, Vercel, DAIE, Mid-journey	