

EDUCATION

Bachelors of Science (BSc), Economics NCAA Division I Collegiate Athlete (PAC-12 Conference, All Academic)	University of California at Berkeley 2001 - 2006
Chartered Financial Analyst (CFA) Level I Candidate Chartered Alternative Investment Analyst (CAIA) Level I Candidate	CFA Institute CAIA Association
AI/ML STRATEGY, BUSINESS INTELLIGENCE + DATA ENGINEERING	+3 YEARS
Artificial Intelligence in Wealth Management AI for Business Specialization AI Product Management Specialization	University of Illinois-Champaign, Department of Economics Wharton, University of Pennsylvania The Fuqua School of Business, Duke University
AI Solutions Architect (AI Strategy, Data Engineering, AutoML/AI Agentic Solutions, MVP/Software Development) 1. Lead venture and enterprise clients in the development of Analytics, Automation and Augmented Intelligence (A3) capabilities. 2. 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) reimagined AI Design workflows and patterns, and (3) revamped Figma configuration and DesignOps stack to accelerate design delivery.	A3 Human Research + Design 2024 - Present
INSTITUTIONAL DIGITAL ASSETS (BLOCKCHAIN, WEB3, CRYPTO)	+4 YEARS
Web3 and Blockchain Fundamentals Fintech: Foundations & Applications of Financial Technology Specialization Decentralized Finance (DeFi): The Future of Finance Specialization Fintech Law and Policy	INSEAD Wharton, University of Pennsylvania The Fuqua School of Business, Duke University The Fuqua School of Business, Duke University
Advisor, UX Engineering and Ecosystem Growth, Core Team (UX-CX, Frontend Engineering, Tokenomics) 1. 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.	PersonalDAO (\$DAO Coin) Apr 2025 - Present
Design Lead, FalconX360 Trading Platform (0-1 Product Strategy, Platform Adoption, CX-UX) 1. First UX hire; enabled market-leading speed for 0-1 product development across +10 Product Managers and cross-functional leads. 2. 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. 3. 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). 4. 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.	FalconX 2022 - 2024
Technical Product Manager (ProductOps, Product Discovery and Growth) 1. Worked directly with the CTO and VP of Engineering to modernize ProductOps and lead growth-focused product discovery sprints. 2. Developed a cross-functional prioritization model to balance (tactical) customer retention and (strategic) product evolution roadmaps. Led sprints to qualify revenue growth and diversification opportunities specific to the monetization of investor First-party Data Rights.	Vertalo (SeriesX) 2021 - 2022
GLOBAL PRIVATE EQUITY (ESG INVESTING, PROJECT FINANCE, SYNDICATIONS)	+3 YEARS
Private Equity and Venture Capital Introduction to Risk Management Perspectives on Digital Transformation: Financial Inclusion	Università Bocconi Corporate Finance Institute (CFI) Banco Interamericano De Desarrollo (BID)
Investment Associate (Global Energy, Mining & Infrastructure Division) 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).	The World Bank International Finance Corporation (IFC) 2008 - 2011

TRADITIONAL FINANCE + INVESTMENT BANKING

+ 2 YEARS

Global Financing Solutions
 Preparatory Certificate in Finance and Financial Markets
 Financial Markets
 Series 7, Series 63, Series 86, Series 89 (inactive)

EDHEC and Société Générale
 Corporate Finance Institute (CFI)
 Yale University
 FINRA Licenses

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

Morgan Stanley
 2007 - 2008

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.

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

Morgan Stanley
 2006 - 2007

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.

UX STRATEGY + TECHNICAL PRODUCT MANAGEMENT (ENTERPRISE SAAS)

+ 3 YEARS

Software Engineering Intensive

Le Wagon, Melbourne

Senior Technical Product Manager (QA Automation and infrastructure, Developer Experience, UX-CX Strategy)

Jackson Hewitt
 2021 - 2022

- Managed deployments to 6,000 franchises and ~2M customers with <5% defect rate while revamping legacy QA/testing infrastructure.
- Led the Tax Studio engineering team, responsible for maintaining programmatic business logic that enables Tax Content Developers (TCD) to make annual updates to federal/state tax rules. Reprioritized a 3-year QA infrastructure backlog alongside senior leadership while advising the CTO and VP of Product on a roadmap for establishing internal/external CX and UX capabilities (siloes to Marketing).

Enterprise User Experience (UX) Architect (UX Design, Information Architecture, Search Engineering - Elastic Stack)

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, Bootstrap 4 migration, AG Grid re-configuration and Angular.js component refactoring resulting in improved user story estimation, sprint completion rates and QA KPIs.
- Partnered with engineering to achieve search performance improvements of 100X while reducing cost +25% by pivoting our legacy platform from Microsoft Azure Data Factory to the Elastic "ELK" Stack, Microsoft AzureSQL and Node.js APIs.

0-1 VENTURE STRATEGY + AGENCY-LED PRODUCT DEVELOPMENT

+ 10 YEARS

Entrepreneurial Finance: Strategy and Innovation

Wharton, University of Pennsylvania

Co-founder, Design Partner (Content-Development, Product Development, UX Engineering)

Design For Impact
 (Agency)
 2018 - 2020

- Led UX, creative strategy and product development for an impact-focused product studio delivering content-driven experiences.
- Led agency efforts across 4 disciplines: (1) Design, (2) Product, (3) Film+Photography and (4) Content Development with an ethos that centered on social impact, authentic storytelling and development of original IP and asset libraries. Built an international talent network and deep experience across all aspects of creative production, agency management, and development of extensive asset libraries.

Founder, Open Source Solutions Architect (UI and MVC Frameworks, Geospatial Libraries, Cloud Architecture)

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 user-driven product development metrics, and standardize cost-benefit evaluation methods for technology procurement and solutions.

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.

Co-founder, Venture Architect (Venture Capital, 0-1 Product Development, Frontend Engineering)

The Wildfyre Group
 (Agency)
 2011 - 2016

- Advised investors and startups in the deployment and fundraising of +\$25M in capital ahead of pivoting to a product agency model.
- 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 all aspects of DevOps, frontend development, UX, agile lifecycles, MVP Development, PMF/early-stage customer acquisition.