

EDUCATION + SKILLS

Bachelors of Science (BSc), Economics	University of California at Berkeley
NCAA Division I Collegiate Athlete PAC-12 Conference, All Academic	2001 - 2006
Software Engineering Intensive	Le Wagon, Melbourne
Financial Markets	Yale University
Web3 and Blockchain Fundamentals	INSEAD
Blockchain Revolution in Financial Services	INSEAD
Fintech: Foundations & Applications of Financial Technology	Wharton, University of Pennsylvania
Decentralized Finance (DeFi): The Future of Finance	Duke University, The Fuqua School of Business
Entrepreneurial Finance: Strategy and Innovation	Duke University, The Fuqua School of Business
Fintech Law and Policy	Duke University, The Fuqua School of Business
Series 7, Series 63, Series 86, Series 89 (inactive)	FINRA Licenses
CFA Level I Candidate	CFA Institute
12 years: 0-to-1 Ventures Strategy	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
+7 years: Financial Analysis and Investment Research	Financial Modeling, Valuation, Due Diligence, Research, Deal Sourcing, Syndications
+4 years: AI/ML/NLP Applications	Applied skillset and

ROLES: INSTITUTIONAL DIGITAL ASSETS (CRYPTO)

+3 YEARS

Senior Product Designer (Institutional Trading Platform, CX, Product Marketing)	FalconX 2022 - 2024
1. Established in-house UX capabilities, managing all design-related delivery at market-leading speed including 0-to-1 net new products and features critical to the launch of FalconX360, the first unified digital assets trading platform (Finnovate Award, 2022) 2. Operationalized UX within the product organization – negotiated Figma, Zeplin, Miro, and FullStory enterprise accounts, lead agile planning across +10 Product Managers, scaled the team from 1 to 4 designers across U.S. and India, and 3. Led internal/external initiatives for Product Marketing, Institutional Sales, TradeOps and Strategy teams to support achievement of various Customer Experience, Product Mix/Economics and Strategy KPIs (i.e. KYC/AML, Credit Utilization, Inbound Funnels, etc.).	
Technical Product Management (Channel Growth, ProductOps)	Vertalo (SeriesX) 2021
1. Worked directly with CTO to lead growth-focused product discovery sprints on identifying opportunity channels 2. to monetize: (1) providing high-quality lead acquisition to broker dealers, (2) facilitating capital formation and syndication models for existing ledger clients and (3) launching a global investor network.	

ROLES: GLOBAL FINANCE

+7 YEARS

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)	
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. 3. Extensive investor relations engagement, editorial review and oversight, technical industry analysis and macro /energy forecasting.	
Global Capital Markets Analyst (Investment-Grade Debt & Derivatives, U.S. Energy, Power & Utilities)	Morgan Stanley 2006 - 2007
1. From origination to syndication, co-led +15 transactions representing new issuance, risk-management, project and hybrid finance, commodity-linked instruments, and derivative products (i.e. CDS) with deals ranging in size from \$100M to \$2.25B. 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.	

TOOLS + STACKS

Design, UX, Product Analytics, BI	Adobe CS, Figma/Figjam, Miro, Jira/Confluence, Github/Zenhub, ClickUp
Data Science, Programming	GA4, Amplitude, Mixpanel, Tableau, Power BI, MS Excel, Domo, Splunk, Hotjar, 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, DAII, Mid-journey

ROLES: 0–1 TECHNICAL PRODUCT DEVELOPMENT

+7 YEARS

Senior Technical Product Manager (Tax Tools, Tax Studio, TCD Developer Experience)	Jackson Hewitt
- Led the engineering team responsible for Tax Studio, the legacy content platform housing all programmatic business logic needed for Tax Content Developers (TCD) to update federal and state tax rules that are deployed to client-facing application. - Managed deployments to 6,000 franchises and ~2 million customers with <5% defect rate while revamping legacy QA and Testing infrastructure.	
Principal Product Manager (UX Architecture, ElasticSearch, Information Architecture, AL/ML Design Patterns)	Acuity International
- Established the UX function. Scaled the team from 0 to 5 principal designers - Led 6-week co-design sprints engaging Federal and private sector customers resulting in pre-sales pipeline of +\$30M. - Led a redesign and frontend engineering sprints to realize significant improvements in code quality, search design - Partnered with engineering to achieve search performance improvements of 100X while reducing cost +25% by pivoting our legacy platform data strategy and architecture the Elastic “ELK” Stack, AzureSQL and Node.js APIs.	
Founder, Solutions Architect (Open Source Architectures, ElasticSearch, DevOps Tools)	Open Ventures
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 and evaluate cost-benefit analysis of technology solutions.	
Select Projects: Engineer Research and Development Center (ERDC) – Led the 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 Viewneo Design System – Led adoption of Storybook and NPM for package management. for a proof-of-concept evaluation of a multi-year +\$20M data warehousing overhaul being proposed by the U.S. Army Corps of Engineers	

ROLES: AGENCY + VENTURE STRATEGY

+7 YEARS

Founder, Venture Architect	Independent
Lead outcome-focused sprints designed to streamline 0-to-1 product strategy, explore ML/AI/Blockchain applications, accelerate generative research, problem space definition, MVP prototyping, customer traction and seed/Series A funding.	
Select Projects: (NDA Applicable) Project A– AI-powered tax transcript analysis packaged as an interoperable web service for B2B/B2C: led (1) exploratory/generative research, (2) SWOT/opportunity sizing (3) AI strategy (3) 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 branding, UX and UI Design.	
Co-founder, Design Partner (Strategy, UX Engineering, Content Development)	Design For Impact
Social impact, authentic storytelling and development of original IP and asset libraries. Built an international talent network and deep experience in creative production Expertise in establishing and standardizing design culture, process,	
Select Clients: - Russel Center for Innovation (RCIE) - USC Race and Equity Center (REC)	
Co-founder, Venture Architect (Product Strategy, Design, UX, Frontend Engineering)	The Wildfire Group
- Advised investors, startups and entrepreneurs in the deployment and fundraising of +\$25M in capital. Areas of expertise in the areas of market sizing, revenue viability, financial modeling and pro forma valuation, term sheet negotiations, deal structuring, business model evaluation (B2B/B2C), fundraising strategy and investor presentations. - Expanded to advising capitalized startups, SMEs, non-profits, and corporations in the areas market strategy, product-market-fit and customer acquisition. Pivoted to a product agency model requiring proficiency in agile software development and leadership of UI design, information architecture, UX research, client-side technologies and devOps for +100 projects.	
Select Clients: AreaProbe – First client, still operational; lead front-end development, branding, UI/UX, and Search product design. SportsMarkit – Lead frontend development, UI/UX, growth strategy. The Gathering Spot – Acquired by in 2016.	