

### 20+ YEARS OF SUCCESS BUILDING AND INSPIRING TEAMS TO CREATE INNOVATIVE CUSTOMER-FOCUSED PRODUCTS AND DIGITAL ASSETS THROUGH VISIONARY LEADERSHIP & DELIVERY GOVERNANCE

#### CAREER SUMMARY

- Versatile, collaborative, customer-focused **TECHNOLOGY LEADER** with broad-based expertise leading the strategy, development, deployment, operations, and support of world-class, innovative Fixed Income products, applications, and service offerings across a variety of large-scale projects within the financial services industry. 20+ years of success delivering future-focused technology solutions for Capital Markets, Banks and Hedge Funds.
- Expertise includes defining product mission, leading and managing product innovation, devising product strategy and roadmaps, creating business cases, building and scaling teams with a sense of product ownership, conducting market research and competition analysis to define the right products for targeted verticals and customers, leading projects from concept through completion, and delivery governance. Highly competent in bringing multiple stakeholders together and creating necessary structures and processes that drive results.
- Excellent planning, organisational, and interpersonal abilities to partner with design, engineering, data, research, operations, sales, and support teams; highly adept at leveraging analytics to constantly evolve and refine product strategies.
- Foster innovation culture fueled by product-led business strategy allowing for agility in time to market, technology and rapid growth.
- A data-driven problem solver to ensure priorities and key product development and GTM decisions are informed by quantitative metrics and qualitative feedback to executive stakeholders.
- Exceptional track record of excelling in roles with constantly evolving responsibilities.

#### MY PASSION

- |  |                                      |                            |
|--|--------------------------------------|----------------------------|
| ◆ Strategic Planning & Execution       | ◆ ROI Optimization & Impact Analysis | ◆ Agile Methodologies      |
| ◆ Product Strategy & Roadmap           | ◆ Budget Management (CAPEX/OPEX)     | ◆ Stakeholder Management   |
| ◆ Go-to-Market Strategies (GTM)        | ◆ Application Life Cycle Management  | ◆ CI/CD Test Automation    |
| ◆ Analytics-driven Product Development | ◆ Risk Management/Surveillance       | ◆ Team Building Leadership |
| ◆ Strategic Integrations               | ◆ Excellent Interpersonal Skills     | ◆ DevOps                   |

#### PROFESSIONAL EXPERIENCE

##### Brevan Howard Asset Management, London

Sep 2023 – Present

##### *Head of Macro, Credit and RV Technology*

**Core Focus:** Streamlining technology for discretionary trading desks and supporting the growth and diversification of the fund's investment strategies.

##### **Key Contributions:**

- Partner closely with the fund's executives, asset class leads, and decision-makers to define the technology strategy and roadmap for the discretionary trading business.
- Work closely with portfolio managers to deliver solutions supporting rapid response to market events for strategy analysis, back-testing, and signals generation.
- Deliver a technology platform to support rapid deployment of trading tools using DevOps, AWS, and containerisation.
- Partner with other technology leads to streamline and modernise the firm's technology estate.
- Building out new technology capabilities to support systematic credit trading including new reference data and execution (EMS) platforms.

##### Vade Mecum Ltd, London

Jun 2022 – Sep 2023

##### *Founder*

**Core Focus:** Serve as a primary thought leader and mentor to multiple B2B fintech start-ups and investors. Provide vision, success criteria, and direction to the cross-functional teams, business unit leaders, and key stakeholders throughout the product lifecycle.

##### **Key Contributions:**

- Partner closely with clients' executives, leaders, and decision-makers to refine their product roadmaps.
- Advise clients in areas such as due diligence, product leadership, distribution, integration challenges, product design, and business strategy.
- Prototyping and UI design for new technologies in the electronic trading space.

## HSBC, London

### Head of Global Debt Markets & Fixed Income Risk IT

Jul 2020 – May 2022

**Core Focus:** Advanced through increasingly responsible positions, culminating in a key leadership role to define and communicate the customer-engaged business strategy and vision for Global Debt Markets (G10 Rates & Credit). Provided direct leadership for the fixed-income risk platforms by fully engaging with and inspiring direct reports, business leaders, and key stakeholders.

#### Key Contributions:

- Worked to transform the risk estate through new consolidated trade repositories and simplified quant interfaces to the analytics.
- Designed and delivered a new single source of truth for trades and valuations for both end-of-day and intra-day uses and real-time use cases.
- Compiled, researched, and recommended respective approaches for feature development (buy/build/partner) to optimise the balance between function, cost and rework.
- Worked with the head of GDM and the chief product owner to initiate a multi-year plan to move away from 3rd party software to in-house-built systems for electronic trading and risk management.
- Partnered with Equities and FX technology teams to reuse and co-develop key pieces of in-house technology platforms and technologies such as common UI tooling (react-based) and algorithmic trading infrastructure saving millions of dollars in new asset development.
- Delivered product releases with a strong bias towards quality, staying on time, within budget, and meeting business objectives.
- Delivered key portions of regulatory programs such as IBOR reform and Basel III.
- Established teams to grow and scale fixed-income risk platforms. Implemented a thriving culture, and entrepreneur-like mindset in a corporate environment to drive a sense of product ownership and urgency to deliver value to customers.
- Trained as a professional leader-coach as part of a pilot program to introduce formal coaching as part of team management at HSBC.

### Head of Fixed Income Cash IT

Mar 2017 – Jul 2020

- Provided technology leadership for the flow-fixed income and emerging markets businesses front to back including bonds, repos, loans, and flow derivatives (IRS and CDS).
- Worked closely with the heads of business and the head of electronic trading to stabilise and improve the technology estate. Outages were reduced by 50% and platform costs were reduced by 30% with increased volumes – 10x in credit.
- Leveraged business demand and regulatory programs such as MIFID II to push for architectural change and technology refresh without additional investment in re-engineering.
- Commended for achieving 70% process time savings through implementing process automation and IT upgrades. Created and executed project management strategies and budgets which escalated revenue and profits and overachieved platform performance goals by 130%.
- Prototyped and launched the first non-vendor trade repository in the fixed-income stack.
- Ensured projects were completed to budget, timelines, and quality standards, and communicated progress to business stakeholders. Evolved more predictive and intelligent testing approaches based on automation.
- Drove a culture of continuous learning & improvement to improve quality, efficiencies, and customer service standards across the department.

## Bank of America Merrill Lynch, London

Sep 2015 – Mar 2017

### Head of Rates Electronic Trading Technology

**Core Focus:** Provided the vision, global strategy, goals, architecture, and oversight for Rates Electronic Trading Technology and Linear Rates for the EMEA region. Owned relationships with existing partners to ensure that there is clear alignment with the organisation's growth plans and partner capabilities.

#### Key Contributions:

- Reduced the eTrading platform cost while increasing its stability and performance.
- Designed a technology refresh for all the electronic and algorithmic trading facilities used for rates market making and execution. The project was accomplished with no unscheduled downtime and delivered by as much as \$XXXXK under budget.
- Drove continual improvement to legacy systems by refactoring old legacy code, while encouraging the adoption of new technologies resulting in 20% reduced cycle time.
- Collaborated with other FICC eTrading technology leads on a cross-asset algorithmic trading strategy.
- Led MiFID-II analysis and design for sales-trader workflows for FX, Rates and Credit.

**UBS, Stamford, CT & London, UK**

**Global Head of Rates & Credit Pricing & eCommerce IT**

**Various Roles in Fixed Income Technology**

Jan 2012 – Aug 2015

Dec 2003 – Jan 2010

**Core Focus:** Progressed through the ranks of the Fixed Income organisation. Spearheaded all aspects of pricing strategy, risk management, market making, algorithmic trading, sales tools, and competitive positioning for Rates & Credit Trading and Execution Services. Developed business cases, defined product requirements, created user stories, partnered/collaborated with industry stakeholders and represented UBS on fixed-income standards bodies and market technology committees.

**Key Contributions:**

- Strategized new product roadmaps and product lifecycle plans by evaluating new trends, technologies, challenges, and market competition.
- Worked together with the execution services business to define, build and launch UBS PIN, a unique pure-agency execution model within a traditional IB.
- Established the technical strategy, data architecture, software and hardware requirements, rapid application development stack, and development standards.
- Built out and launched the bank's first automated IRS pricing and electronic trading platform leveraging distributed computing for real-time pricing.
- Reduced the cost of the rates front office risk platform while improving its performance for near-real-time use cases.
- Served as change catalyst; defining, setting vision and consistently motivating teams to deliver award-winning solutions.

## EARLY PROFESSIONAL EXPERIENCE

**JP Morgan Chase, New York, NY**

**Vice President**

Jul 2003 – Dec 2003

**Scrittura Inc., New York, NY**

**Chief Technology Officer**

Jun 2001 – Jul 2003

**Jemtech Solutions LLC., New York, NY**

**Chief Technology Officer**

Aug 1995 – Jun 2001

**PRC**

**Programmer Analyst**

Oct 1993 – Aug 1995

**University of Pennsylvania Department of Physics, Philadelphia, PA**

**Application Programmer**

Jun 1991 – Jun 1993

## BOARD MEMBERSHIPS AND THOUGHT LEADERSHIP

**TransFICC, London**

**Board Member**

Jul 2020 – May 2022

(TransFICC is a FinTech start-up creating innovative solutions for market connectivity; served on the board of directors representing HSBC)

## EDUCATION

**Bachelor of Arts, 1993**

**University of Pennsylvania, Philadelphia, PA**