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[Operations Specialist](#) | [Business Analyst](#) | [Data Migrations](#) | [GIPS](#) | [Project Management](#) | [Performance Measurement](#)

Professional Experience

Performance Measurement Solutions – Chicago, Illinois

Principal Consultant

December 2010 – Present

- Expert knowledge of the GIPS® Standards, providing a framework for firms to navigating the GIPS compliance process.
- Strong understanding of the operational processes surrounding all aspects of the investment management firm structure, creating efficiencies in workflow processes throughout the firm.
- Initiated efforts to increase overall operational efficiencies with respect to the operational activities of a firm through intensive business analysis processes.
- 25 years of experience working with over a dozen portfolio accounting, CRM, performance, and composite management platforms with experience with portfolio accounting system conversions and new software integrations.
- Ability to project lead on short, as well as long-term projects that require organized and detailed interdepartmental communications across all aspects of a firm.
- Provide operational assistance as it relates to all aspects of the performance measurement process encompassing all facets of individual account & composite performance returns.

Ariel Investments – Chicago, Illinois

Performance Manager / Operations Specialist

June 2006 – February 2010

- Interfaced between the Marketing, Operations, Technology, Legal and Compliance teams to achieve the proper configuration of investment software applications for effective data distribution & firm-wide reporting techniques.
- Initiated efforts to revamp operational processes promoting continuous operational efficiency and reporting techniques.
- Managed portfolio accounting system data integrity as it related to individual/composite performance.
- Developed/updated/outlined all policies and procedures for all operational and performance-related processes.
- Provided support in the form of training, procedural documentation, data dependency investigation, data integrity testing, risk mitigation and determination of appropriate application ownership.

Managers Investment Group – Chicago, Illinois

Operations Specialist / Performance Analyst

September 2000 – May 2006

- Responsible for the collection, internal maintenance, and external dissemination of all investment product data.
- Managed the daily reconciliation process for over 5000 wrap accounts on multiple external sponsor platforms.
- Responsible for limited trading and billing activities which included investing new accounts, portfolio rebalancing and investment account maintenance, as well as processing all invoices for High Net Worth and Institutional clients.
- Initiated new software products to enhance existing offerings while continuously reporting to senior management the progress and status of the overall implementation.

Wachovia Securities – Chicago, Illinois

Supervisor / Performance Analyst

August 1995 – September 2000

- Managed six Performance Group team members who were responsible for all data integrity issues while providing performance support to a sales force of more than 1300 investment consultants.
- Oversaw the quarterly reporting process for 15,000 performance reports for both internal and external recipients.
- Educated Performance Group team members on various computer applications, reporting techniques, and software updates, while updating existing policies and procedures to ensure adherence to documented guidelines.
- Liaison between 3rd party services and outside custodians, advisors and/or internal staff to resolve reconciliation issues regarding processing of new accounts, asset transfers, cash management and all other account-related inquiries.

Education & Certifications

- Master of Business Administration (MBA) – Northern Illinois University - May 1997
- Bachelor of Science (BS) – Finance Major, Accounting Minor – Illinois State University - May 1994
- Certificate in Investment Performance Measurement (CIPM) – CFA Institute - June 2014
- Certified Associate in Project Management (CAPM) – Project Management Institute - April 2023