Ritesh Shah

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Summary:

* Seasoned and result oriented IT Business Analyst & Project Management Professional with solid experience in Project management,Business Analysis, Product management, Release management, Capital Markets products offering,Hedge Fund Accounting, Banking & Corporate Finance.
* Solid understanding of business requirements with broad insight of business drivers and pressures, to manage and deliver successful projects and programs.
* Very well versed with agile, iterative and water fall project management methodologies.
* Senior project leader primarily responsible for driving lean and effective business solutions which support large project/ program benefits.
Project professional (PMP certification) with experience in managing business and IT projects. Full project management life cycle exposure. Responsible for engaging and leading project teams and communicating with stakeholders at all levels.
* Certification: PMP, CSC, CPH, DFC, OLC, LLQP, Canadian Investment Funds Course (CIFC).
* Excellent communication and interpersonal skills. Ability to deal with stakeholders and business executive at all levels.

Education:

MBA – Finance - S.P. University

B.Sc. – M.S.University

Certifications:

* PMP Certification from PMI – License 1821845
* Life License Qualification Program (LLQP) – Apr 2016
* Canadian Securities Course (86%) in July 2004
* Customs and Practice Handbook Course (85%) in August 2005
* Derivatives Fundamental Course (88%) in March 2006
* Options Licensing Course (85%) in June 2006 from Canadian Securities Institute.
* Passed Financial Accounting-1(A+) and Auditing -1 (A) from Centennial College, Toronto in April 2007.

**Computer Expertise:**

* MS Project, Word, Excel, Power Point, Visio, Easy Project, SharePoint.

**System/Software knowledge**:

* Universal Banking: Oracle Flexcube 12.1, Oracle Online Digital Banking Experience (OBDX ver 17.2), Infosys Finacle, MQ & SWIFT.
* Hedge Fund Accounting/Portfolio & Shareholder Valuation: Multifond, Geneva, NTAS, Hedgetek, Paxus.
* Market Data Provider: Bloomberg, ADP, Reuters.
* Project Management and ITSM tools: Atlassian JIRA, Microsoft Project, Service Now, Manage Engine, Smart Sheet, Confluence, BMC Remedy.

Career History:

MUFG Fund Services Canada

Sr Project Manager/Scrum Master/Sr. BA & SME

Dec 2015 – Aug 2019

* Planned, managed, lead and oversaw the end-to-end delivery of requirements throughout the lifecycle of the project in alignment with the business and/or enterprise needs and strategies.
* Implemented One Trust vendor solution for GDPR compliance regulatory initiative.
* Successfully completed Oracle online digital banking experience (OBDX) product implementation project for MUFG to offer treasury and forex, credit and other banking services to its institutional clients that increased product revenue by 50%.
* Successfully implemented Core banking application upgrade project worth approx. $5.5mln banking software upgrade from Oracle Flexcube 7.3 to Flexcube 12.1 with focus on business user trainings, change management and operationalizing new product workflows. This involved managing contractors, on-shore and offshore vendor resources as well as staff augmentation resources and in-house project team.
* Effectively interacted with stakeholders, business executives and managed large teams during all the phases of enterprise release cycle invonving build, test and deploy.
* Utilized JIRA, Service Now and MS project with SmartSheet as ITSM and PM tools.
* Owned the facilitation and end-to-end delivery of business requirements following an agile or waterfall approach to determine how requirements are constructed, traced and prioritized to maximize business value.
* Provided leadership, guidance and support in defining the business needs, business benefits, or problem/opportunity statements based on strategic drivers and identifying potential solutions.
* Supported the Product Owner through Ideation and consulted on project/prodct set up/alignment.

UBS Global Asset Management

IT Project Manager/Sr. BA/IT App Manager

Sep 2010 – Dec 2015

* Worked as a PM & Sr. BA and was instrumental in developing and successfully implementing proprietary FoHF applications - TraCS, FOF Platform and FOF Datamart for Fund of hedge fund business unit that are now key competitive advantage for the firm with distinct product offering for MUFG. My role was focused on defining and explaining business logic, translating business requirements into functional specifications that IT teams can leverage to translate into design document and eventual product development to oversee successful production launch with post go live application management as a SME and IT owner.
* Managed three FOF applications as an IT Manager/SME to support ongoing BCI, change requests, Project related integration impacts on these applications and managing enterprise wise data product life cycle covering data quality, data governance and MDM with DWH/BI reporting as an IT owner with representation to weekly change advisory board for change approval.
* Managed external vendors and offshore and onshore resources and handled contracting (Fixed cost, fixed capacity, Time and Material, Staff augmentation) with vendors with annual review and SLA tracking.
* Coordinated with vendors, internal resource groups and procuring necessary input for successfully executing projects.
* Contributed to the delivery of the Business Case by collaborating with stakeholders defining project benefits measures and effort estimates to achieve benefit results/objectives.
* Ensured traceability of requirements to from the business solution to benefits realization and back to Target Operating Model throughout project/program.
* Led and guided the work of other BAs deployed on the project defining and managing the requirements effort including cost and timeline.
* Collaborated with technology partners and provided recommendations to support development of system requirements and design, testing plans, artifacts/deliverables to ensure business needs were met.
* Appllied variety of elicitation techniques to probe, challenge and understand requirements.
* Identified risks or issues with the prioritization of requirements and the technology design/ solution which may impact realization of project benefits and provided recommendations and support to stakeholders in making decisions to pro-actively resolve or mitigate potential risks/delays to the project.
* Supported the Request for Information (RFI) or Request for Proposal (RFP) process with vendors as and when required.
* Supported Quality Assurance activities which included reviewing test plan, test cases and providing guidance on testing and defect reporting.
* Supported change management and overall project/program readiness activities.

Citigroup Alternative Investments

Business Project Lead/ Supervisor

May 2007 - Aug 2010

* Worked as a PM for all new technology initiatives, conversion of funds from one system to other, integration of systems and processes including matching of all the GL’s and trial balance as well as mapping chart of accounts and sub-ledgers.
* Acted as the delegated Business Lead/Product Owner when called upon.
* Proactively identified and tracked requirements risks, issues, assumptions, dependencies, constraints and anticipated and effectively managed risks related to requirements. Aligned decisions to Client’s risk appetite.
* Managed a team of 3 Testers and 2 Analysts that performed User Acceptance Testing before new enhancements or system upgrades were scheduled to go live in the production environment.
* Successfully lead project implementation for a $25 billion AUM global hedge fund at Citigroup and client on boarding for 25 US limited partnership funds from US site to Canada.
* Ensured that all audit and control requirements were met by identifying control deficiencies and implemented appropriate procedures to mitigate any risk or control losses.
* Ensured overall operating efficiency. Objectives included standards of conduct, quality standards, performance objectives, and productivity guidelines.
* Identified any opportunity for, and implemented process improvements, service enhancements, or technology enhancements
* Utilized agile and iterative methodologies and participated in user story creation and sprint planning and prioritization using JIRA as a tool.
* Drafted emails and controlled project schedules, resource tracking, proactively managed risks and coordinated tasks across different divisions.
* Effectively interacted with stakeholders, business executives and managed large teams during all the phases of enterprise release cycle invonving built, test and deploy.
* Specialization included master-feeder funds, multi manager funds, off shore and onshore feeder and fund of funds and US limited partnership funds.
* Hedge fund accounting included NAV valuation for the portfolio, pricing, corporate action, interest and dividend accruals and comparing variation in portfolio net asset with benchmark index for the fund.
* Converted funds from various accounting systems to Multifond and ran pre-parallel and parallel for new clients.
* Verified Bloomberg/Reuters data for the portfolio valuation and corporate action as necessary.
* Excellent knowledge and ability to run Multifond and Paxus systems for portfolio valuation and performance fee allocation.

CIBC

Trader (CIBC Investor’s Edge)/ Product Specialist (Mutual Funds – CIBC Securities Inc)

Feb 2004 - May 2007

* Traded bonds, equities, foreign currencies, Mortgage instruments, Options, IPO’s, OTC securities, mutual fund, debentures, participatory notes, banker’s acceptance, T-Bills and other financial instruments.
* Reviewed client accounts on the spot for credit violations, limitations and took appropriate action.
* Handled all re-org instructions for corporate actions like M&A, dividend, stock splits etc. as per client’s instructions.
* Managed credit covenants and security deposits with liquidity margin for various options strategies.
* Managed Mutual funds, Personal portfolio services and fixed term investment accounts and supported branch advisors and sales personnel on these products as a product specialist.