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PROFILE:
Extensive experience in financial services industry, including Business Analysis, Business Systems Analysis, and Software Quality Assurance to support business and technology needs. Concentration in the Software Development Life Cycle, business analysis, requirements, UAT and QA testing, data management, business process, investment industry, banking, asset management, mutual funds, capital markets, derivatives, reconciliation, corporate actions, audit packages, investment operations, portfolio accounting, and reporting. Proven strengths in business analysis, business systems analysis, QA testing, defect life cycle, implementation life cycle, requirements analysis and documentation, facilitation as liaison between business and technology, test case development, data mapping, accounting analysis, problem solving, issue tracking and resolution, and collaboration with cross-functional teams. Motivated by a fast-paced environment and teamwork.

Capital Markets/Securities Industry: Asset management, security master file, performance and market data vendors, trade life cycle, trade settlements, pricing and valuation, corporate actions (domestic, foreign, taxability, entitlement, scrubbing data, vendors), corporate action life cycle, collateralized mortgage obligations (CMOs), mortgage backed securities (MBS), asset backed securities (ABS), collateral, futures, options, swaps, OTC/Derivatives, trade order management, fixed Income, general ledger, FX, currency, anti-money laundering, regulatory onboarding and compliance, broker commissions, wealth management, trust accounting, erisa annuals, front office, back office, middle office background, investment banking, retail banking card fraud.

Mutual Fund Industry: Accounting analysis, global custody, operations, investment management, mutual fund audit packages, fund conversions, transfer agency, cash/securities reconciliation, investment operations, NAV, pricing and valuation, portfolio accounting, fund operations, fund accounting, fund administration, equity, fixed income, asset classes, alternative investments, retirement plans and defined benefits.

Business Analysis: Requirements elicitation, requirements analysis, facilitation, collaboration, focus groups, interviews, documentation (use cases, business requirements templates, business cases, business requirements, report specifications, functional designs, business rules catalogs, user stories, acceptance criteria, technical specifications, standard operating procedures, meeting minutes, user guides, client training materials, milestones, project plans, release notes, RACI), process improvements, project management tasks, project success criteria, business process analysis, data mapping, data dictionaries, report data maps, process flows, As-Is and To-Be scenarios, JAD sessions, swim lane diagrams, wireframes, data analysis, root cause problem solving analysis, data management, gap analysis, requirements life cycle and change management, solution evaluation, story grooming, sprint retrospectives, data warehousing, Big Data, source to target data flows, BABOK seminars, Agile, Waterfall, Scrum.

Software Quality Assurance: Test case development, test planning and release cycle, test estimates and resource capacity, test data, test execution (User Acceptance Testing (UAT), Quality Assurance Testing, functional, regression, user interface, ETL (extract, transform, load) transformation logic, source to target, SQL stored procedures, manual/automation scripts), UAT coordination with internal/external stakeholders, client implementation test packs, testing artifacts, test plans, on/off shore teams, defect life cycle, issue management and tracking tools, data quality, QA process documentation, testing data flows through integrated applications, data flows through structured/unstructured data repositories/data lakes, defect resolution, SQL queries, requirements traceability.

SKILLS:
Quality Center (HP ALM), Word, Excel, Microsoft Outlook, PowerPoint, MS Project, Visio, Office 365, Snagit, Bloomberg, DTC, SEI, MCH, EDI, Telekurs, Gainskeeper, Capital Changes, Sharepoint, Lawson, TPG (The Portfolio Genius), Bloomberg TOMS, LVTS (Longview), Cognos, Avaya, TSYS, QA Complete, Varden eReportal, Skype for Business, Jabber, WebEx, JIRA, Confluence, Service Now, Hyperion (Brio), Remedy, Oracle SQL Toad, Microsoft SQL Server, Aqua Data Studio, Business Objects, Rally, Aha!,

Microsoft Visual Studio Team Services, Microsoft Team Foundation Server (TFS), Microsoft Teams, Service Now, Postman, Workday, Trello, Airtable, Lucid Charts.

EXPERIENCE:

Broadridge Financial Solutions, Inc., Greater Boston, MA   **10/19-12/19**
Senior Business Analyst
- Requirements gathering and documentation and implementation life cycle for defined client solutions using multiple products and services.
- Performed business analysis, documented internal and client facing requirements, requirements scope matrix, business rules, data requirements, and process flows.
- Facilitated meetings and collaborated with Client Services, Sales, and Project Manager to support the development and implementation of solutions and client relationship.
- Represented and led client solution throughout project implementation, worked with Engineering, Operations, Data Production, and QA teams.
- Performed analysis and documentation for additional artifacts as needed, including project definition documents, specifications, and coordinated implementation deliverables.

Private Software Company, Boston, MA   **03/19-09/19**
Senior Business Analyst
- Performed requirements elicitation, analysis, and documentation of business requirements for product management group.
- Collaborated with technical team, stakeholders, and cross-functional teams to ensure successful implementation of requirements and product management roadmap.
- Collaborated with Product Manager and Director of Product Management for roadmap development, business planning, project planning, and backlog for multiple projects.
- Created business requirements template, defined and documented business requirements, data requirements, user stories, use cases, process flows, and implementation deliverables for new partner program with external vendor.
- Performed comparison analysis of project management tools, defined and documented process to manage requirements backlog.
- Performed analysis and documentation for operational readiness requirements for new release.
- Performed requirements gathering and analysis for global content operations mainframe system replacement.
- Performed requirements elicitation, analysis, and documentation for data requirements for global content ingestion data flows.
- Performed requirements analysis and test plan development for data warehouse integration project.

First Help Financial, Newton, MA   **07/18-03/19**
Senior Business Analyst
- Led business requirements by evaluating operational objectives, business processes, business functions, gathering information, and eliciting requirements to support strategic initiatives and new projects for various departments and programs.
- Collaborated with the Chief Executive Officer, Chief Technology Officer, Director of Operations, business managers, and IT manager to elicit, define, and document business requirements.
- Documented business requirements, functional specifications, workflow diagrams, process flows, wireframes, business rules, database impacts, data requirements, user interface impacts, application enhancements, and user guides.
- Collaborated with the business and development teams to understand the operational and technical impact across multiple systems, and implement new functionality in release cycles and sprint backlog.
- Collaborated with technical team and external vendors for varied system integrations, web API integrations, data mapping, to resolve defects, implement solutions, and enhance the user experience.
- Significantly reduced documentation gaps on old and new projects, reducing development time needed to implement solutions.

- Provided improvement opportunities to management for software development life cycle and agile frameworks, as requested.
- Defined project requirements by identifying project milestones, phases, and testing scope.
- Documented test plans, test data, performed test case development and test execution for sprint releases, coordinated testing with QA engineer and developers.
- Collaborated with the business and product development teams to align product roadmaps, architecture, coding, and development timelines with business needs.
- Participated in cross functional meetings with senior leadership, business managers, QA engineer, technical team, and developers, contributed to a team effort by accomplishing results when needed, and produced ad hoc requirements documentation for Chief Executive Officer.

Aclara Technologies, Wellesley, MA   **02/18-07/18**
Senior Business Analyst
- Performed requirements gathering and documentation of business requirements for client implementations.
- Reviewed business requirements documentation across existing projects and built new standard business requirements template for client engagements.
- Defined and documented business requirements for website application involving client and vendors, documented project success criteria and process flows.
- Participated in requirements workshops and cross functional design discussions for complex data sourcing and data integration solutions.
- Performed analysis and documentation for data requirements, documented data integration specifications, process flows, and data mapping documents.
- Facilitated communication and coordinated development efforts with other product lines to ensure that client deliverables would be met.
- Performed analysis and documentation for website integrations, documented website integration specifications and process flows.
- Collaborated with UX designer, developer, and project manager for website design and configuration requirements.
- Performed gap analysis for legacy system migration to assess functionality and identify gaps in requirements documentation.
- Performed ongoing analysis, reviewed statement of work, client data requirements, client solution proposal, and completed complex data analysis tasks.
- Defined testing scope, prepared test plans, and executed test cases.

Commonwealth of MA, Boston, MA   **07/17-01/18**
Senior Business Analyst (Consultant)
- Supported project manager with implementation life cycle for new enterprise system implementation, mainframe system replacement at Registry of Motor Vehicles (RMV).
- Defined requirements for each stakeholder impact in collaboration with project manager and system architect for stakeholders that exchanged data with the RMV.
- Coordinated implementation efforts for development, testing, and production with external stakeholders and internal Information Technology entities.
- Identified gaps in requirements and business processes, facilitated communication, assigned tasks to business or technical owners, defined milestones, and followed items through to completion within project deadlines.
- Documented use cases, process flows, requirements, business rules, acceptance criteria, and project plans to articulate business and technical processes and implementation deliverables for varied interface impacts (batch files, web services, user interface portals).
- Documented business requirements and wireframes for external interface partner project website, collaborated with project manager, webmaster, developer, business owners, and Communications team.
- Served as point of contact for 200+ external stakeholders, delivered external stakeholder communications, coordinated webinars and meetings with interface partners, project manager, system architect, and business or technical subject matter experts, and logged action items in project management system.
- Gathered information from internal/external resources, effectively collaborated across departments to ensure that project work streams moved forward and milestones were completed.

- Participated in cross functional meetings with project manager, system architect (third party vendor), internal IT entities, business subject matter experts (SMEs), and external stakeholders.
- Distributed design documents, coordinated access to development and test environments, responded to external stakeholder inquiries for development and testing, managed expectations, documented meeting minutes and frequently asked questions documents, logged defects/data issues, and facilitated trouble shooting with technical resources.
- Performed requirements analysis and documented report specifications for reporting database to assist director with bank card vendor implementation and reconciliation needs.

Cognition Financial, Boston, MA   **02/17-07/17**
Business Analyst
- Defined and documented business requirements for scrum team.
- Coordinated day to day project activities in collaboration with Scrum Master and Product Owner.
- Led requirements meetings, focus groups, joint application design (JAD) sessions, user interviews, discovery meetings with Business Sponsors to elicit, define, and document business and systems requirements, and built consensus among stakeholders.
- Partnered with Product Owner, Developers, Business Users, and subject matter experts to document business requirements, user stories, acceptance criteria, business processes, product enhancements, process improvements, and solutions.
- Documented use cases for current (As-Is) and future (To-Be) scenarios and process flows for legacy system migration, collaborated with UX Designer.
- Served as liaison between Business Management, IT Development, and internal/external users to ensure that requirements met business needs and were understood by technical team
- Translated ongoing scope changes and solution discussions into user stories that align with scrum team deliverables and roadmap, using JIRA, SQL, Visio, and internal applications.
- Coordinated User Acceptance Testing (UAT) with stakeholders and QA resource, documented release notes, and provided post implementation testing support.
- Investigated operational issues, gathered requirements for business and technical problems, and documented recommendations to implement solutions.
- Facilitated communication between project team members, with end goal of exceeding stakeholder expectations and improving scrum team velocity.
- Collaborated reactively and proactively to identify ways in which application modifications, strategic projects, and process changes could improve user experience and service delivery.
- Performed ongoing analysis, participated in scrum sprint planning activities, backlog reviews, training sessions, demos, sprint retrospectives, presentations, and performed responsibilities to support project delivery and business process analysis.

Global Atlantic Financial Group, Brighton, MA   **10/16-12/16**
Senior Business Analyst
- Leveraged internal data warehouse, SQL database, Business Objects, requirements, data dictionaries, and data mapping documents to support internal business units, testing, control processes, and external third party administrators in a data management group.
- Collaborated with business units for strategic projects, process improvements, requirements, and data management initiatives to support business needs.
- Researched file failures for IT Production Support team to ensure that data files from third party administrators were successfully processed into data warehouse.
- Reviewed IT architecture diagrams and documented use case and process flow for data file data flow through data warehouse platform.
- Participated in UAT testing for third party administrator conversion, reviewed data files for financial transactions and policy data against front end user interface and SQL database, identified and logged defects.
- Performed analysis for ad hoc data requests for JIRA tickets with SQL queries and Business Objects.

UnitedHealth Group, Boston, MA   **02/16-07/16**
Business Systems Analyst (Consultant with INSYS Group, Inc.)

- Translated business requirements into effective solutions in collaboration with scrum team for Big Data project in a data management technology group, scalable agile environment.
- Documented use cases, user stories, and acceptance criteria for end to end flow through Big Data platform, identified open issues, and gathered information from business and technical subject matter experts.
- Documented functional specifications, source to target mappings, metafiles, and business rules.
- Performed analysis for data sources, assisted with data source questionnaires, created metafiles, documented the field lengths and field formatting, validated against the data file layouts.
- Acted as liaison between business, developers, QA, and project management groups.
- Collaborated with QA team to ensure testing efforts aligned with acceptance criteria, provided guidance and documented test cases as needed.
- Performed requirements analysis to acquire and process data files through Big Data platform with downstream flows into data lake, SQL database, Business Objects, and internal applications so data could be used for business needs.
- Led meetings across time zones and participated in solution discussions with developers, solution architect, product owners, and SME's to facilitate communication and gather requirements to support development.
- Performed ongoing analysis and planning for scrum sprints, supported scrum master and team tasks, and identified dependencies with other scrum teams.

Atrius Health, Newton, MA   **10/15-02/16**
Business Analyst
- Developed expertise on data warehouse, source and target systems functionality and data flows in data warehouse, system analytics and reporting group.
- Performed source to target testing with SQL queries to support UAT testing for ETL rewrite project, documented test cases, identified and logged defects.
- Performed requirements analysis and documentation for business rules catalogs to support claims database and finance department.

Santander, Boston, MA   **08/15-10/15**
Business Analyst
- Engaged in business process mapping sessions with Six Sigma process engineer to design issue management process for data quality deficiencies in source systems across bank.
- Documented swim lane diagrams, process flows, and standard operating procedures.
- Contributed to data management data mart business requirements documentation, reviewed data dictionary and data model, created high level test scope, and created report object matrix.
- Participated in analysis and review sessions to support project management office, data governance, data management, and data quality initiatives.
- Supported maintenance of data quality defect and issues log for data quality deficiencies across all source systems (CCAR edit checks, broken processes, code, and data issues).
- Performed analysis and provided requirements documentation for Issue Management Requirements proposal for an automated tracking tool.
- Performed data mapping for data warehouse, produced documentation for metadata team.

Liberty Mutual Insurance, Boston, MA   **01/15-08/15**
Business Systems Analyst
- Responsible for planning, monitoring, and coordination of modifications affecting the Enterprise Services application suite (claims, billing, batch jobs, data flows through integrated systems, databases), requirements analysis, QA planning, test execution, and support for moderate to complex initiatives.
- Communicated with Business, IT team, and QA team to elicit requirements and successfully manage the testing effort within a defined Release for JIRA tickets to understand impact to applications and database tables to determine testing scope.
- Developed and executed detailed test scripts from project specific requirements using Excel, Hyperion, SQL, HP ALM, and automation scripts.

- Conducted analysis and updated process documents for Defect Management Plan and Requirements Management Plan.
- Initiated JIRA tickets for assigned applications, gathered and documented requirements for change requests and escalated production support tickets, communicating with Business Units, IT, and QA, and following JIRA workflow through to completion.
- Conducted root cause problem solving analysis for department LEAN initiative, conducted interviews, gathered requirements and documented use cases, standard operating procedures, project plan, checklists, and presented analysis to department management.

Acadian Asset Management, Boston, MA   **06/14-01/15**
Business Systems Analyst
- Conducted analysis, led requirements gathering and documentation (business requirements, report specifications, use cases, test cases, procedures, business capability template, and project release support requirements) for 5 report migration efforts simultaneously for report automation project.
- Wrote test plans (50000+ steps in test cases), performed testing of client reports in Varden eReportal application and validated results with internal applications, eReportal data libraries, SQL stored procedures, and external vendor files.
- Documented business processes, managed expectations, and elevated problems and opportunities in the context of reporting requirements, report specifications, and data sourcing for various investment strategy reports, crystal reports, broker commission reports, and custom performance summary reports.
- Conducted business and systems requirements analysis and collaborated with technical resources for complex data sourcing, metadata attributes, data mart inventory analysis, report data maps, and documented exception reporting procedures.
- Performed preliminary analysis of data mart inventory results to identify available data required for future report automation efforts, data sourcing, and to determine the scope of data mart inventory project.
- Created spreadsheet to track defects and automated defect workflow utilizing QA Complete bug tracker for 5 different report migration efforts, coordinated defect workflow with business users and developers, routed defects, coordinated defect resolution, and logged/monitored production tickets for report implementations.
- Collaborated with developer and internal parties (Client Reporting Group, Portfolio Construction Group) to determine FX rate logic for broker commission reports, performed testing against trade order management system and multiple databases, and coordinated defect resolution until reports were successfully implemented into production.
- Coordinated JAD sessions for requirements documentation, project status meetings with business users and technical team, updated project plan tasks, documented meeting minutes, and performed other tasks and analysis to support the development team, business users, and project manager for the client reporting enhancement project.

Mercer, Norwood, MA   **10/13-01/14**
Reporting Analyst
- Responsible for creating reports for defined benefits populations using Cognos and SQL.
- Validated Cognos report results against multiple report mapping requirements and process flows documents, SQL queries, and against front end of the Benecalc participant record system.
- Performed data analysis, modified SQL queries, logged defects, researched participant records in Benecalc system for defined benefits populations, and worked with Cognos developer to analyze complex queries to resolve broken Cognos reports.
- Created report processing matrix to track internal/external report deliverables, documented manual process for specific broken Cognos reports, and created issues log to track defects.

Citizens Financial Group, Inc., Medford, MA   **03/13-10/13**
Operations Analyst
- Responsible for collecting, reviewing, responding, and analyzing data to ensure compliance with department policies, procedures, and regulatory and risk requirements in RBS Citizens Business Services/Risk Operations/Debt Management, Mortgage and Fraud Operations Unit.

- Performed routine, analytical review of customer data and documentation for fraud and risk activities to monitor patterns, trends, and velocity.
- Applied various methods and system applications (Mainframe, TSYS, Card risk management systems) including direct contact with internal and external parties, to confirm fraud, identify funds at risk, and elevate alerts to fraud analytics team.
- Completed anti-money laundering and regulatory compliance training.

Federal Home Loan Bank of Boston, Boston, MA   **09/12-12/12**
Fixed Income Analyst
- Maintained all MBS (mortgage backed securities) and CMO (collateralized mortgage obligations) investment accounting activity for the MBS fixed income portfolio via the bank's automated subsidiary ledger, The Portfolio Genius (TPG), and extracted Bloomberg data for factors, floating rates, and projected cash flows.
- Prepared all related general ledger journal entries, executed SQL queries to upload payment files to accounting system, and researched variances via Freddie Mac, Fannie Mae, and Trustees.
- Responsible for recording all cash settlement activity at Citibank and Federal Reserve Bank accounts for MBS transactions and for calculating/reconciling collateral payments from counterparties.
- Performed analysis for daily, monthly, and quarterly reconciliations to ensure accuracy of fixed income portfolio and TPG accounting system, and prepared documentation for audit department.

Fidelity Investments, Boston, MA   **09/11-09/12**
Business Analyst/Quality Assurance Analyst (Consultant with Veritude)
- Supported the QA and UAT testing within project scope for new development project (Fidelity ActionsXChange ActioNResponse system for notification/response processing for voluntary corporate actions).
- Performed business analysis and developed test cases for event change management, standing instructions, portfolio manager functional workflow, user interface design changes, mobile device functionality, cross browser testing, code reviews, regression, and client specific requirements.
- Performed test execution, identified missed code logic and requirements, logged defects via Quality Center, participated in SDLC (waterfall/agile/scrum) with the project team, maintained metrics spreadsheet for project manager and produced estimates for test efforts.
- Conducted 4 hour WebEx meeting with offshore development team to explain cross functional end to end workflow so defects could be resolved and worked closely with development team.
- Participated in project meetings with internal parties for business requirements, system design document reviews, defect triage sessions, code reviews, test case reviews, and enhancements to existing functionality.

Wolters Kluwer Financial Services, Waltham, MA   **11/10-08/11**
Corporate Actions Analyst
- Performed UAT testing and updated Gainskeeper software for security master file and corporate actions database with security data attributes and market/sector exchange data for clients.
- Created and documented procedures, recommended ways to improve workflow and process improvements that established accountability and created a paperless audit trail, and cross trained team members on foreign corporate actions.
- Created process for identifying foreign corporate actions via report extraction from third party vendors (Exchange Data International, DTC, Bloomberg, and Telekurs), and communicated with vendors to confirm corporate action details.
- Analyzed, researched, and processed corporate actions, reviewed taxability, updated market value, reconciled actions with client, tested macros, and analyzed system functionality.
- Performed business analysis and analyzed reports for programmers, provided feedback with documentation, and elevated system bugs and limitations.

Blue Cross Blue Shield of Massachusetts, Inc., Quincy, MA   **05/10-11/10**
Member Service Representative
- Consistently provided exceptional customer service to external and internal customers in call center. Advised, investigated, and resolved member inquiries.

State Street Corporation, Boston, MA   **01/05-04/10**
Senior Associate/ Audit Reporting Group
- Prepared 80 mutual fund audit packages each month for audit firms and client and, verified accuracy of trial balance for all basis levels.
- Completed testing, compiled documentation, contacted internal and external parties, and resolved discrepancies on quarterly, semi-annual, and annual audit funds.
- Produced audit packages within deadlines for Financial Reporting, Fund Administration, Sarbanes Oxley, Compliance, Tax Reporting, auditors, and clients.
- Reviewed general ledger, accounting system, reports, excel spreadsheets, and elevated issues to internal departments to verify accuracy of trial balance in high volume, deadline driven environment.
- Reviewed, monitored and updated log to track funds and exceptions completed by India.
- Questioned and verified accuracy of cost, gain/loss, interest and dividend income, receivables, open trades and FX activity, prices, FX rates, closing entries for all basis levels, capital gains and dividend distributions, market value, total net assets, cap stock activity, broker summaries, expenses, swaps, options, futures, government breakdowns, etc.
- Participated in additional training (via State Street, PricewaterhouseCoopers) for fixed income, futures, Accounting Principles, Audit Guide, amortization, complex and derivative securities, swaps, and business writing.

Bank of America, Boston, MA   **03/00-12/04**
Operations Analyst, Columbia Management Group
- Analyzed 70 mutual funds for accuracy with custodian cash balances daily and contacted internal and external parties at all levels and across companies to resolve issues and exceptions.
- Worked with consultant to create macro to identify position breaks and eliminated aged exceptions backlog.
- Extensive work with trading room, investment managers, operations, and external fund accountant for mortgage backed securities, corporate actions, and trade issues.
- Identified system bug in external fund accountant's system that incorrectly combined original face for certain securities during fund conversions and reported bug to external fund accountant for correction so position breaks could be resolved.
- Identified internal system bug that duplicated money market instruments on funds and elevated bug to IT department for correction so incorrect repo and cash sweep amounts could be deleted.
- Reconciled non-custody accounts via custodian websites, client systems, and statements.

EDUCATION:
B.A.
Dickinson College, Carlisle, PA