

CHIEF TECHNOLOGY OFFICER | VP ENGINEERING | ARCHITECT

Polyglot Technology Executive with proven track record building and scaling high-performing teams of 40+ to dozens of product launches, AWS / Azure / Google transformations in multiple industries using Agile, ITIL and CMMI methodologies. Managed operational & capital budgets over \$5M per annum and established IT strategy and roadmaps for a \$1B company. Graduated above 90th percentile of students from top-tier computer science school & teacher of software analysis & design.

EDUCATION

Master of Science (MS)
Batchelor of Science (BS)

eBusiness Technology, School of Computer Science
Neuroscience, School of Natural & Agricultural Sciences

Carnegie Mellon University
University of California, Riverside

SKILLS & EXPERTISE

- Performance Engineering for High Volumes
- Recruiting → Training → Team Building
- M&A Negotiation & Partner / Vendor Relations
- New Concept & Emerging Market Development
- Multi-Million CAPEX & OPEX Control
- P&L, Balance Sheet, Forecasting, ROI
- Design + Reduce Total Cost of Ownership (TCO)
- Create Technology Budgets, Governance and Roadmaps
- Align with Product, Sales + Marketing, Data Science, Ops
- GitHub, Jira, Confluence, Trello, Slack, Figma, InVision
- Python, C#, F#, Ruby, Java, React, TypeScript, SQL
- C4 / UML / Markdown class, sequence, ER diagrams
- Zachman, TOGAF, S.M.A.R.T. codebase, S.A.F.E. product
- Policies, procedures and boardroom presentations

SELECTED ACHIEVEMENTS

Last10K.com

Revenut.com

RiskProAdvisor.com

CalSouthern.edu

RiaMoneyTransfer.com

MySpaceTV.com

CE.UCI.edu

Co-Founder + CTO of profitable SaaS; [Top paid iPhone/iPad finance app in App Store \(2022\)](#).

Built [open source / FOSS](#) mobile + web app and API for SaaS revenue forecasting.

Launched next-generation enterprise virtual portfolio strategist system with \$3B AUM.

Procured CMS to develop / launch new 100+ course catalog website with CRM integration.

Promoted to governance team after launching B2C website with \$3.5M transactions/month.

Co-managed development teams and launched YouTube-competing streaming site.

Tenured 10-year [teacher for Division of Continuing Education](#) at University of California.

EXECUTIVE EXPERIENCE

Finfare, Inc.

Early-stage (Series A) fintech startup with a focus on AI-powered expense management payment systems

Hybrid / Irvine, CA.

Chief Architect

2022 - 2023

Owned end-to-end multi-product architecture, roadmap and \$3M budget for single-page application (SPA), microservices and AWS cloud architecture for 13 onsite engineers.

- Defined KPIs based on DevOps Research Assessment (DORA) built on vendor-neutral application observability facade that report performance metrics that met strategic business vendor SLA and achieve card network certification.
- Managed both commercial and contractual side of identifying and procuring Payment Card Industry (PCI) Qualified Security Assessor (QSA) for attestation that satisfied short- and long-term banking partner integration and security requirements.
- Collaborated with VP of Credit/Risk and designed custom ML algorithm delivered through decision engine to mine thousands of variables in real time and provide proprietary scoring on prospects for credit decisioning modeling.
- Partnered with vCISO and CCO to write & adopt 12 IT and security policies including Patch / Asset Management, Password, Remote Access, Clean Desk, Anti-Malware and Wireless Networks that passed bank's cyber risk management due diligence requirements and aligned with SOC-2 security standards.
- Oversaw development of entire Infrastructure-as-a-Service (IaaS) that defined and deployed 17 version-controlled cloud services consistently for entire tech stack across multiple accounts, regions and environments via orchestrated event-driven architecture.
- Recruited experienced backend and data engineers from YC's HackerNews at zero cost.

The Pacific Financial Group

Registered Investment Advisor (RIA) with \$3B AUM and developer of automated risk profiling and portfolio construction SaaS for financial advisors and brokers.

Hybrid / Newport Beach, CA.

Enterprise Architect

Reporting to Chief Product Officer, responsible for \$2M budget of onboarding 30+ person onshore + offshore DevOps and SecOps with AWS.

- Principle technology chief responsible for governance, facilitation and vendor integrations of technology for sales, operations, trading and distribution teams.
- Defined architectural strategy and API integrations that led to “all-in-one” risk profiling, portfolio construction and surveillance technology on the largest wealth management platform, Envestnet with 103,000 advisors across 4,900 companies.
- Led R&D efforts on evaluating new data pipeline orchestration & workflow management platform that was implemented to create revenue line by monetizing fund performance metrics by curating 100+ million positions monthly.
- Recruited DevOps Security Engineer and Cybersecurity Analyst to follow NIST cybersecurity framework for small businesses.

2019 - 2022

Training Consultants

Financial qualification exams preparation provider for RIA and broker-dealer firms regulated by FINRA.

Santa Ana, CA.

Vice President, Technology

Reporting to CEO, responsible for \$1M budget of all technology + cloud / Azure changes that will serve new exam restructure set forth by regulating authority.

- Served as executive team member that defined short & long-term business goals, objectives / OKRs and KPIs with company co-founders.
- Architected predictive analytics model by learning from over 87K exams in 18 years to identify at-risk students early-on.
- Achieved accreditation pre-qualification with US Department of Education authority by writing inquiry and pre-application submissions that established congruence with eligibility requirements.
- Completed SIG assessments in data security required by current clients to ensure vendor compliance set forth by regulator.

2017 - 2018

California Southern University

Regionally accredited (WASC) online university offering degrees at the associate, bachelors, masters and doctoral levels.

Irvine, CA

Chief Technology Officer

Reporting to University President, managed \$1.5M P&L for software engineering, DevOps, QA, business intelligence, product management and technical support of student learning and back-office systems hosted on Microsoft Azure.

- Formed and held committee chairman role that led to defining next-generation distance learning environment & learning consortium interoperability standards to deliver interconnected learning management (LMS), administrative student information (SIS), Salesforce CRM and Microsoft ERP ecosystem.

2016

Ria Financial

Subsidiary of Euronet Worldwide (NASDAQ: EFFT), provider of financial services and 3rd largest money transmitter worldwide.

Buena Park, CA.

Senior Manager, Product Development & Technology

Reporting to General Manager, managed \$5M P&L by hiring 11 engineers to create ‘Payment-as-a-Service’ global money transfer platform on Microsoft Azure.

- Founding member of Digital division; created and executed technology strategy plan that led to development and launch of company’s first B2C offering.
- Oversaw engineering of 7 identification & payment providers that facilitated consumer website to be launched in 12 countries which achieved 6th place sales ranking in a 200,000+ agent network.
- Launched first white label integration with Boost Mobile’s mobile wallet app for Android & iOS with beta release of React Native.
- Wrote e-commerce policies that contributed to qualifying company to be a financial service provider for Walmart.

2010 - 2015

ADDITIONAL EXPERIENCE

[Systems Architect](#)

[.NET Engineer](#)

[Senior Systems Analyst](#)

[Consultant](#)

Pacific Alternative Asset Management Company, Irvine, CA.

MySpace.com, Beverly Hills, CA.

UnitedHealth Group, Costa Mesa, CA.

Olofson Technology Partners, Newport Beach, CA.