

CHIEF TECHNOLOGY OFFICER | VP ENGINEERING | ARCHITECT

Polyglot Technology Executive with proven track record directing teams of 40+ to dozens of product launches 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. Experience operating at high scale—trillions of data points per day—with high availability, providing always-on alerting, visualization and tracing for infrastructure and applications globally. Graduated above 90th percentile of students from top-tier computer science school, teacher of software analysis & design.

SKILLS & EXPERTISE

- Scaling for High Transactions & Large Volumes
- Recruiting / Training / Team Building
- M&A Negotiation & Partner / Vendor Relations
- New Concept & Emerging Market Development
- Multi-Million CAPEX & OPEX Control
- Create technology budgets, governance and roadmaps
- Alignment with Product, QA, DevOps and Data Science
- GitHub, Jira, Trello, Slack, Figma, InVision
- Python, C#, F#, R, Java, Node.js, React, Typescript
- C4 / UML Class, Sequence, Activity, ER Diagrams

PROFESSIONAL EXPERIENCE

Finfare, Inc.

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

Remote / Irvine, CA.

Chief Architect

2022 - 2023

Responsible for tech stack, roadmap and budget for React single-page application, Python microservices and AWS cloud architecture for 13 onsite engineers.

- Defined KPIs based on DevOps Research Assessment (DORA) that allowed Engineering teams to measure deployment frequency, mean change lead time, mean time to recovery and change failure rate for higher velocity & predictability.
- Managed both commercial and contractual side of procuring PCI v4 QSA for attestation that produced a single service contract for compliance and pen tests.
- Collaborated 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 SOC2 security standards.
- Developed entire Infrastructure-as-a-Service (IaaS) by creating Cloud Development Kit (CDK / Python) that defined and deployed 17 version-controlled serverless services consistently for entire frontend and backend stacks across multiple accounts and regions within minutes.
- Recruited backend and data engineers from YC's [HackerNews](#) at zero cost.

The Pacific Financial Group

Registered Investment Advisor (RIA) and developer of automated risk profiling and portfolio construction SaaS for financial advisors and brokers.

Remote / Newport Beach, CA.

Enterprise Architect

2019 - 2022

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

- Principle technology chief responsible for leadership, facilitation, analysis and design 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 ETL pipeline orchestration & workflow management platform that was implemented to create revenue line by monetizing fund performance metrics across 30 dimensions by curating 100+ million positions monthly.
- Recruited DevOps Security Engineer and Cybersecurity Analyst to follow NIST cybersecurity framework for small businesses.

Training Consultants

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

Santa Ana, CA.

Vice President, Technology

2017 - 2018

Reporting to CEO, responsible for \$1M budget of all technology 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.
- Expedited new web application projects by engineering base solution with commercial and open source / FOSS code repositories via GitHub.
- Completed SIG assessments in data security required by current clients to ensure vendor compliance set forth by regulator.

California Southern University

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

Irvine, CA

Chief Technology Officer

2016

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.

- Formed and held committee chairman role that led to defining next-generation distance learning environment following learning consortium interoperability standards to deliver interconnected learning, administrative, CRM and ERP systems.

Ria Financial

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

Buena Park, CA.

Senior Manager, Product Development & Technology

2010 - 2015

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

- 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 that 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.
- Wrote e-commerce policies that qualified company to be a financial service provider for Walmart.

University of California, Irvine

Top 50 public co-educational research university.

Remote / Irvine, CA.

Teacher

2005 - 2015

Part-Time teacher for the University of California, Irvine Extension.

- Created and taught 10-week curriculum for Object-Oriented Analysis and Design course that teaches students how to design complex software by eliciting technical requirements, create UML diagrams, applying design patterns, calculating metrics and overall software best practices.

ADDITIONAL EXPERIENCE

Revenut.com
Last10K.com

[Open source / FOSS](#) mobile app and API for SaaS analytics.
Freemium SaaS for analyzing large financial disclosure documents.

EDUCATION

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

eBusiness Technology, School of Computer Science – **Carnegie Mellon University**
Neuroscience, School of Natural & Agricultural Sciences – **UC Riverside**