

Bespoke Search Group COO

Accomplished, innovative and versatile COO with a strategic mindset, leading people, driving results and innovation, providing operational excellence through transformation, leadership and culture. An open and frequent communicator at all levels of an organization with the ability to create a clear line of sight from mission and business priorities to individual roles and clear goals. Experienced in interpreting and applying data and analytics and communicating results. Thinks and leads diverse global teams via robust business processes and operational understanding with the ability to handle multiple priorities, complex projects and teams through direct accountability or influence. Knowledge of risk management and compliance and acts as a bridge builder and partner with excellent cross-functional and team-building skills. Develops and maintains consultative relationships with key business stakeholders, proactively identifying and addressing business needs via a strategic to hands-on approach. Understands ESG standards and regulations including TCFD, UNPRI, SFDR, SASB, as well as emerging technology. Known for demonstrating a strong understanding of sustainability operations and frameworks, and how to apply them to the business.

- Strategic Planning
- Business Management
- Budgeting / Forecasting
- Product Development
- ESG
- Sustainable Finance
- Distribution / CRM
- Program Management
- Project Management

PROFESSIONAL EXPERIENCE

Confidential, New York NY,

2022 – present

Managing Principal

Advised PE firms, Asset Managers and startup technology companies on their ESG / Sustainability strategies. Provided strategic planning, road mapping, KPI selection and program management for large and startup firms.

- Led the advisory board of ESG Data providers focusing on private company data and AI.
- Captured ESG KPIs for over fifty portfolio companies of a \$5 billion private equity firm.
- Developed a 1- 3- 5-year product roadmap for a Sustainable Finance / ESG data provider.
- Identified additional product development solutions and partnership opportunities for a startup Carbon Capture and Reporting technology firm.

Confidential, New York NY,

2012 – 2022

Managing Director – COO Responsible Investing, 2017 – 2022

As part of the X leadership team, managed the Responsible Investing Organization, building the initial 4-person team into a global organization of over 30 investment professionals. Developed a robust organizational structure to support X's ESG mandate across 6 asset classes. Incorporated ESG criteria into the investment process and ensured new regulations and client expectations were met. Managed the agenda to commercialize ESG and Impact capabilities, services and offerings.

- Launched over \$45 billion of assets under management via 25 ESG and impact products.
- Responsible for a \$50 million annual budget, delivering within 3% of plan.
- Developed the Responsible Investment Data Platform with over 100 prop and 3rd-party data sources for ESG investment decision making, reporting and client relationship management.
- Captured over \$25 billion in client capital managing RFPs and content creation.
- Launched an Advice program to support retail and institutional client channels sales.
- Architected the net-zero pathway in support of the parent company's net-zero commitment.
- Led the X response to the 2022 ESG SEC exam.

Director – Strategic Initiatives and Client Distribution Services, 2012 – 2017

Responsible for strategic initiatives including M&A activity, merger integration, process improvement activities and solutions and strategic planning cadences.

- Performed due diligence for the \$6 billion merger.
- Identified over \$50 million in efficiencies through ops and tech post-merger integration
- Managed a \$200 million X Fund launch.
- Captured \$3 million in annual savings across X shared service functions.
- Rolled out the CRM strategy and launched the Salesforce.com for Distribution.

Confidential), New York, NY

2009 – 2012

Principal – Financial Services Lead

Oversaw the financial services practice for the New York office with over \$200 million in revenue. Directly responsible for 28 consultants, running day-to-day management for the FS practice while overseeing multiple consulting initiatives. Managed the annual budget and developed the office business plan tracking sales and expenditures.

- Ran a \$20 million program management office redefining risk reporting for a global bank.
- Saved \$2 million offshoring risk management and reporting for a global financial service firm.
- Implemented shared services for a \$1 trillion boutique model asset manager.
- Identified \$1 million in savings for the treasury department of a global financial institution.

Ernst & Young Advisory, New York, NY

2007 – 2009

Senior Manager – Asset Management Advisory

Provided senior leadership for the wealth and asset management advisory practice working with organizations with global wealth and asset managers, creating operating models, overseeing program management and launching new businesses and products.

- Implemented the operating model for a \$250 million distressed debt fund.
- Assessed SOX 404 controls of an \$8 billion asset manager to support an IPO.
- Created a \$550 billion asset manager Program Management Office for the operations.
- Identified 10% “LEAN” cost savings of the overall budget for a \$500 billion asset manager.

Legg Mason, New York, NY

2003 – 2007

Vice President – Chief Administrative Officer

Led the business management function of the Global Fixed Income Equity division, focusing on Global Operations, Compliance, Sales and Marketing, Finance, Human Resources, and Recruiting, and managing a staff of ten full time employees. Established and maintained strategic and business results reporting distributed to senior management, the Global Project Office, and Risk Management.

- Managed the \$40m annual operating budget including strategic initiatives.
- Built a 24-by-6 trading desk consolidating US, UK and Asia Pacific trading operations.
- Ran the program management office for all business initiatives.
- Managed multiple system implementations including accounting and trading platforms.
- Led operational risk and coordinated audit and regulatory reviews across the firm.

ADDITIONAL RELEVANT EXPERIENCE

- Accenture LLP
- Prudential Investments
- KPMG Consulting LLP
- Federal Reserve Bank of NY

EDUCATION

Bachelor of Science, Finance

Yeshiva University, Sys Syms School of Business, New York, NY