Curriculum Vitae
Michael Veith

Master Data

Name	Michael Veith
Experience	since 2008
Year of birth	1980
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Nationality	German
Languages	German (native) English (business fluent)

Management Summary

My business focus within financial industry spans from asset management, including all front and middle office processes, to fund administration, (global) custody (including TOM readiness and fund / process migration), and index calculation. As being both, project manager and business analyst, I either gather Business requirements and/or coordinate the implementation within IT (software and data flows) and operational units (processes) accordingly, all including testing. I'm in strong collaboration with portfolio and risk managers, product developers, business architects, traders, legal and compliance officers, marketing experts and all other parties involved in accounting processes; also third party communication and collaboration is a vivid asset of my project management skills. Methodologically, I'm applying the Scrum framework, whenever the organisation allows for agile procedures. As Scrum Master, I train and encourage project members to rely on Scrum values and to utilize Scrum methods and artifacts to unfold their full potentials. Small to medium size development tasks, I'm also happy to accomplish on my own.

Main Competences

Project Management, Strategy Consultancy, Scrum, agile and hybrid project management styles, Transition Planning, Workshop organisation and hosting, Business Analysis, Team lead (also locally distributed), Security Lending, Collateral Management (bilateral and tri-lateral), MiFID II, Sec. 871 (m) IRC, Sec. 305 (c) IRC, Fixed Income and Multi Asset Portfolio and Risk Management, Liability Driven Investments (LDI), Bloomberg AIM, Xentis, Fixed Income Indices, Multi-Asset Indices, Equity Indices, Over-the-counter Products (OTC), esp. CDS and swaps, Vanilla OTC Index Options, Flex Options, FX Forwards, Workflow Coordination and Process Engineering, Index Business Architecture, e-Mail Campaign Management.

Education

(1991–1997)	Gymnasium Netphen – “Mittlere Reife”
(1997–2000)	Berufkolleg Technik Siegen – High School Degree (1,6)
(2001–2006)	University of Siegen – Magister Artium (M.A.) (1,7): **English Linguistics** (main), **Psychologies** (minor), **Computer Science** (minor)

Career Structure

(07–09/2007)	**SAP Labs**, Palo Alto, CA, USA – Trainee
(2008–2010)	**DIErektBERATUNG AG**, Frankfurt/Main – IT and Business Consultant
(2010–2015)	**Allianz Global Investors GmbH**, Frankfurt/Main – *Assistant Vice President*
(2010–2012)	Coordination, Project work and strategic support within Front Office Services department, Frankfurt/Main
(2012–2014)	Business Consultant, Project- and Team Lead of Front Office Custom Solutions unit, Frankfurt am Main, Paris, London, Milan (12 internal and external employees)
(2014–2015)	Business Consultant, Project Lead and Specialist Overlay Portfolio and Risk Management, Frankfurt am Main, reporting line incl. Global CIO Office

Capabilities

Software	MS Windows, Linux, MS Office (esp. Excel, Word, PowerPoint), MS Visio, Bloomberg incl. AIM, Xentis, Confluence, ESP, IBM Open Pages, Sciforma (former PSNext), Informatica Power-center, HP Quality Center, Jira, etc.
Languages	PL/SQL (esp. Oracle & MS SQL Server), Python, Perl, Java, VBA, Bash, Matlab, Xentis FINAL
Processes	**Fund Administration / (Global) Custody:** Back Office processes, SWIFT, Loan and Collateral management (bilateral and trilateral), transaction type parametrization, MiFID II workflow (producing both, WM Daten and EMT standard), implementing 871m/305c tax cash flow process **Asset Management:** Front Office, esp. Portfolio Management, Trading, FIX, Trading Platforms, Security Lending, Middle Office operations, Order and Investment Workflow, OTC Busine **IT and Infrastructure:** Incident and change management using HP Quality Center, Business Services coordination, smart customization, automation, mobile phones, server move, office automation migration, office move **Index Business:** Index calculation and pricing, index review and rebalance, factsheet creation, e-business, e-marketing and customer-relation management, corporate actions management

	Business Services: Developing means for mitigation of operational, cross-functional risks (i. e. Multi Asset and Fixed Income (esp. Corporates, Non-Benchmarked) Portfolio Management, Legal & Compliance, Risk, Operations, Trading (esp. Credit and Interest Derivatives) and IT, Credit line set-up and coordination
Know-how	(Cross functional) **Project Management**: tracking and reporting of project progress, e. g. to Steering Committees (milestones, budget issues, etc.), Scrum Master **Team Lead:** motivation and direction, holding of meetings and workshops, agile methods, Scrum Master (servant leadership) **Strategic Planning:** transition planning, TOM readiness and migration, restructuring, customization, process analysis and optimization, mitigation of operational risk, Straight through Processing Front to Back, Accounting and Custody vendor management **IT Development:** Workflow coordination and data feeding using bash scripts and VBA, Scrum, Informatica workflows, and ESP applications, application parametrization and interfacing, Python development

Project History

Since 06/2023

EA, Data Governance & Delivery – Enterprise Data Architecture, Allianz Global Investors

Senior Consultant, Business Analyst, and Project Manager for several data architecture projects

- **Lighthouse**: Within the IDS work stream I'm part of the planning team, organizing the future cooperation between AllianzGI and Investment Data Services (IDS)
- **Powercenter & DIF cloud migration**: In-depth analysis of running workflows (Informatica Powercenter) feeding data mainly from front office systems into connected sub-systems, and vice versa. Goal is to identify redundant workflows which can be decommissioned or organized in a leaner manner
- **Midlayer decommission**: identification of all relevant tasks and workflows within this given database (MS SQL Server, Java), which is functioning as the backbone between front office and all connected systems along the value chain
- **Re-organization of Midlayer infrastructure**: Investigating alternative sourcing of front office data from within Bloomberg / AIM into the to be designed golden source architecture (DataBricks, Bloomberg, MS Azure)

04/2023 - 06/2023

- Parental Leave -

04/2022 – 03/2023

Data Management Operations – Static Data, Universal Investment

Business Analyst fund administration migration projects "Berlin / OUI" with Oddo BHF Asset Management, "Energy" with Siemens Fonds Invest, and "ADAC"

Doing multiple fund migration projects in parallel bears risks and possibilities at the same time for the absorbing company. As responsible business analyst, my mandate is to extend existing interfaces and to develop new ones to allow for a much higher degree of automation during the migration process. This serves for both, reducing operational risks and increases scalability. Working in the static data context, my tasks are for example:

- Uploading private, unknown, and exotic securities into Xentis (staging tables of an Oracle database, SQL, VBA, Oracle APEX)
- Mapping ratings and other third-party information around securities
- Setting up funds, portfolios, and tranches in Xentis
- Checking setup of business partners communication, i. e. brokers, custodians, clearing partners, collateral managers, advisors, etc.

01/2022 – 04/2022

Data Management Operations – Static Data, Universal Investment
Business Analyst gathering requirements regarding security event processing
In this business analyst role, I was responsible for meeting auditors' findings and senior expert requirements towards a self-developed tool "Ereignisverarbeitungs(EV)-Monitor". Knowhow regarding all sorts of corporate actions and about processes feeding those events from WM Daten into Xentis and into the tool. My tasks have mainly been, but have not been limited to:

- Conducting design workshops and brainstorming sessions with experts to draw down the needed changes within the tool
- Communicating documenting and training with IT to implement and test the developed features
- Documenting changes of the processes and features as well as conducting training sessions for business users

Technology, Operations & Products – Investment Services, Allianz Global Investors
Business analyst and developer of custom solutions and OTC derivatives workflows
This role was meant to cover all sorts of topics, workflows and operations existing in the front office of an international asset manager. During my consulting activity two dedicated projects became of special interest:

- *Bloomberg Swap Hedger*: To support the quantitative fixed income portfolio management in rolling their monthly interest rate hedges, I developed a Python based tool to load automated interest-rate swap deals into Bloomberg. This application allowed for a tremendous increase of scalability and reduction of operational risk
- *Bloomberg User Maintenance app*: I developed a Microsoft Power Apps application which allows for a convenient way to maintain user rights and restrictions within Bloomberg trading and portfolio management system. This allows for a decommissioning of the old Microsoft Excel based solution. By doing so, multiple workflows and processes could be channelled through the novel tool, which made the user rights management much more secure and compliant with existing ITIL based obligations

12/2021

Department of Quality Management and Enterprise Development, Helaba Invest
Trainer and Senior Consultant on Atlassian Confluence

I trained a Helaba Invest employee to use Confluence to publish his work in “Projekt KAIT-Umsetzung” by means of an SSMK wiki.

10/2021 – 02/2022

Data Management Operations – Pricing Data (IT), Universal Investment
Business Analyst in charge of and developer for assuring KAIT compliance for pricing tools

My mission is to analyse the current VBA macro landscape for updating OTC prices in Xentis. Therefore, I choose a three-step approach, including:

1. Identification of status-quo: What tools are in use, for what purpose? Documentation and clustering of given technical solutions
2. What are the missing pieces to fulfil the KAIT regulations? Documentation and derivation of action items and requirements
3. Actual development and resolving of identified needs, restructuring of existing tools.

In parallel, I’m trying to understand the feasibility to use a more standard approach with Bloomberg BVAL in order to streamline the pricing of OTC products to a larger extent.

05/2021 – 06/2021

- Parental Leave -

04/2021 – 12/2021

IDS: Project Manager / Scrum Master of Market Data Project "REFPAC-Prestudy" (Refinitiv to replaced Bloomberg and other market data vendors)

Ultimate goal of this project is to set up a possible program plan that allows for a potential realization of stakeholders demands using the now available market data provided by the vendor Refinitiv. Before the actual migration of the data may happen in a number of to be approved sub-projects, scope needs to be defined together with the stakeholders, impact for IDS as data services provider need to be identified, and rough estimates need to be gathered from internal subject-matter experts. On basis of these components, a viable program with dedicated migration projects, showing dependencies, synergies and potential risks indicates and suggests feasibility and likelihood for satisfying stakeholders’ demands. As project manager in charge, I lead my team in an agile manner, as a servant leader. Topics of interest for this pre-study are:

- Accounting
- Compliance
- Credit and Market Risk
- SAP
- Company and investment related data
- Corporate Actions
- Bloomberg and Refinitiv APIs
- ESG and Sustainability
- Lipper Fund Data (look-through and key figures)
- Company sector classification (TRBC, NACE, CIC, GICS, ICB)
- Morningstar
- WM Daten
- GLEIF and Bureau von Dijk company data

02/2021 - 05/2021

IDS-SD: BA – Investment Solutions, Investment Data Services, Senior Consultant, Business Analyst and Scrum Developer

As business analyst in charge and Scrum developer in the agile team “IDS 6+2, STAR Data Factory“, I was leading the coordination and contributing the concept work on a new data warehouse (status quo: Oracle DB) approach for IDS (including novel concepts like a net of data lakes and micro-services embeddable via API fed by a virtualization layer). As a first prototype I developed such a novel concept for company / issues data. Furthermore, I supported the team in understanding agility and the Scrum framework. Last but not least, I set up a new Jira board for the project.

10/2020 – 02/2021

IDS-SD: BA – Investment Solutions, Investment Data Services, Senior Consultant, Business Analyst and Scrum Developer

Business Analyst in charge and Scrum developer in Scrum team „Compliance Cockpit – CoCoON / ISH“

As part of the Scrum team, I further developed the compliance toolkit of the Allianz Group (incl. AllianzGI), named CoCo or Compliance Cockpit. During this I also supported the product owner in communicating to the stakeholders, helped the Scrum Master fostering agility and Scrum values in the team and cooperated with the developers by providing business analyses and mock-ups. During the course of the project, I wrote database queries and derived views and tables from that to feed the underlying Oracle DB data mart. The following business functionality are was able to improve:

- Short Selling Reporting
- Sensitive Industry Reporting
- Issuer-Level Reporting

The following aspects to strengthen Scrum framework implementation I was able to achieve:

- Backlog refinement
- Sprint goal definition
- Definition of ready (during backlog refinement)
- Including stakeholders in sprint reviews

07/2019 – 09/2020

Operations Control and Infrastructure, Universal Investment, Senior Consultant, Business Analyst and Developer

Business Analyst in charge and developer for migrating and further development in project “HCOB”

In my role as senior consultant, I conducted business analyses and developments for the business team Client Insourcing. Thereby, I was in charge of the following tasks:

- Technical connection and adoption of various file formats to UIS interfaces,
- Set up of UCDI templates and development of VBA macros to feed a shadow accounting framework for insourcing mandates,
- Further development of existing VBA macros for reconciling shadow accounting positions and fund key figures

11/2019 – 08/2020

Portfolio Management Operations, Universal Investment, Senior Consultant

Lead Consultant for trading and portfolio management operations within Xentis and surrounding systems

As senior consultant on the interface between Business and Operations & IT, I'm responsible for the technical as well as business support in the following areas:

- Setup and maintenance of FIX connections between Xentis and Multi Trading Facilities like Bloomberg (TSOX, EMSX, and EMSxNet), Tradeweb or Calastone and direct connections to brokers (FIX 4.2 and 4.4)
- Setup of both execution and order placement brokers within Xentis, including customizing the corresponding interface definitions and order routing parameterizations
- Incident management regarding ordering, trading/dealing and pre-matching processes
- Consultancy for front office migration of dealing / ordering processes from Xentis to Simcorp Dimension

11/2019 – 06/2020

Operations Control and Infrastructure, Universal Investment, Senior Consultant and Business Analyst

Lead Business Analyst for technical communication onboarding in project "GALILEO"

In conjunction with the migration of Metzler Asset Management's fund administration business to Universal Investment, I am responsible for the following onboarding tasks within Universal Investment's Operations department:

- Analyzing existing onboarding procedures and formats for connecting Universal Investment with business partners (i. e. custodians, asset managers, KVGs, clearing brokers, loan agents and collateral managers)
- Gap analyses of new partners that come with the integration with regards to
    1. The identification of new business partners
    2. The exchange of desired file formats and protocols (i. e. SWIFT MTxxx, BVI Sheets, etc.)
- Onboarding of to be integrated funds into corresponding communications with relevant business partners
    3. Coordination of setup of all related static data within Xentis and connected systems and infrastructure
    4. Consulting of related work streams (static data, for instance) with regard to necessary gap analyses and onboarding
    5. Conjunction of integration tests between Universal Investment and business partners
- Process engineering of loan programs (bilaterally with BMS and tri-party with Deutsche Bank pooling and BNY Mellon as custodian) covering the following topics:
    6. Booking of loans and loan returns
    7. Linking and booking of collateral positions, security and cash
    8. Linking and booking of earnings

07/2019 – 10/2019

Department of CIO Organisation, ITERGO Germany, Senior Consultant and Scrum Master

No details may be disclosed for confidentiality reasons

03/2019 – 07/2019

Department of Quality Management and Enterprise Development, Helaba Invest, Senior Project Manager and Scrum Master

Project Lead “SiPPS – Standardisierung individueller Prozesse, Produkte und Services” (i. e. Standardization of individual Processes, Products, and Services) in conjunction with the program “Fitness“

In the course of the program “Fitness“, which is meant to modernize Helaba Invest's operations, my project is characterized by a heterogenous composition of working packages/ sub-projects. Requirements, in this connection, span from purely business process related subjects to extensions of existing tools and implementation of novel solutions. The methodological approach is correspondingly flexible. Besides classic waterfall engineering, I also do apply more agile approaches where possible and advised. I used to be in charge for the following domains and tasks:

- Coordination and prioritization of working packages which show dependencies to other projects within the program scope
- Regular strategic consultations (besides status reporting meetings) with program leading board and members of the steering committee (incl. top management)
- Selection, coordination and directing of sub-project teams following the waterfall approach
- Consulting of agile sub-projects as Scrum Master
- Planning and conduction of business requirements and design workshops during project's analysis phase
- Coordination of requirements concerning involved systems like Xentis and DOXiS, among others

Lead development of program “Fitness“ Confluence microsite, in order to foster and improve employee communications

In order to inform all employees in the best possible way about the status and progress of the overall program as well as its projects and measures, I have designed a dedicated microsite for the program in Confluence. This, I equipped with participatory elements. Motivation for this, is, besides the pure distribution of news, the reduction of fears of contact and reservations against the significant upheavals that accompany the requirements of the program.

09/2018 – 01/2019

Products / Global Custody Team, BNP Paribas Securities Services, Senior Project Manager and Business Analyst

Coordinating Business Requirements in Global Custody stream within project “Scorpius”

In my role as Business project manager and analyst in the Scorpius project, I worked closely together with both, involved Business units and IT on the one hand and respective counterparts within other locations (Luxembourg and Paris) and third party partners (DWS as lending agent and KVG, BNY Mellon as tri-party collateral manager, and State Street Bank as bilateral collateral manager) on the other hand. Ultimate goal of the project used to be – until it has been stopped – to migrate fund accounting and custody to BNP Paribas. My tasks included but were not limited to:

- Analyse existing processes and provide gap analysis in front of the background of the new requirements coming from the Scorpius project.
- Coordinate Business Requirements Documentation involving both experts from Frankfurt and Luxembourg working in global custody and Depotbank context
- Organise joint testing between BNP, BNY Mellon, DWS, and State Street Bank
- Consolidate transition plans from Business and IT, preparing a shared transition, implementation, and migration preparation planning for BNP and DWS

04/2018 – 08/2018

- Parental Leave -

10/2016 – 03/2018

Business IT Change Team, BNY Mellon, Senior Project Manager and Developer

Providing MiFID II compliant workflows for accounting system Xentis

Working jointly with various experts from within business teams, I was member of a development project team to establish both, MiFID II compliant processes within Xentis and respective reporting to WM Daten and a connected fund distribution system. My tasks included but were not limited to:

- Develop reliable infrastructure connecting all involved parties, incl. inbound and outbound feeds and user interfaces, incl. ETL streams using Perl and Python scripts on a RedHat OS environment to move data between Front Office Xenis and Mainframe data servers
- Create relevant transaction and fund related custom fields in Xentis
- Design outbound data feeds (Xentis FINAL and Oracle SQL) for MiFID II reporting
- Develop ESP applications in order to orchestrate workflow components
- Manage and coordinate locally distributed developer team with members in India and Germany
- Coordinate and conduct testing in-house and with WM Daten

Development of Sec. 871 (m) and 305 (c) IRC complaint tax transactions within Xentis

Being technical project manager and developer in one person, I gathered all relevant requirements jointly with the Tax team in charge. Besides setting up the inbound transaction feed from the source system in the USA (on IBM Mainframe), I was also responsible for the accounting setup within Xentis. My tasks include but are not limited to:

- Develop proper design for booking delivered transaction information into Xentis
- Implement interface modifications and transaction types needed
- Coordinate testing with business and developer team in the USA and Germany

03/2016 – 09/2016

Change Management, STOXX (Deutsche Börse), Senior Project Manager

Adobe Campaign coupling to Salesforce

Working jointly with the Marketing department, I managed a project to connect Salesforce CRM (SF) with Adobe Campaign (AC). Goal was to organise all e-Mail marketing using AC, incl. event and campaign management, SF synchronisation, etc. My tasks included but were not limited to:

- Adopting AC functionality onto Salesforce custom workflows
- Establishing one company wide campaign approach using AC
- Procurement management incl. multiple vendors conducted

- Sophisticated Business Requirements planning mastered

Establishment of Fixed Income Index Framework, Index migration

In order to support Product Development and Business Architecture departments I managed two important projects around index calculation. One project dealt with the launch and streamlining of a novel Fixed Income Index family framework, whereas the second one's subject was to migrate an Equity index family into a unified Equity Index framework. My tasks included but were not limited to:

- Independent setting up of all relevant Index production processes and tools
- Calculation configuration, data quality and saturation
- Index review and rebalancing (incl. corporate actions)
- Client communication (reports, factsheets, website)
- Establishing of pipeline process for industrialised approach
- Gathering of lessons-learnt impacting setup of revised Equity index framework
- Migration of custom index calculation onto a unified configuration engine
- Efficient and enterprising stakeholder management (steering committees, etc.)

Office and Infrastructure Move

In my role as Senior Project Manager I was consulting the COO area in a great disentanglement programme. The disciplined progress tracking of all relevant tasks and the reporting of it to the upper management was one of my key responsibilities here. My project coordination tasks included but are not limited to:

- Physical office move with Facility Management of the absorbing company
- Mobile phone process incl. SIM card management and hardware ordering
- Index calculation and data processing server move
- Office Automation planning

09/2015 – 02/2016

Global CIO Office and Investment Application Management, Allianz Global Investors

Senior Business Consultant and Project Manager

In order to mitigate operational risks within Overlay PM processes and to achieve economies of scale and scope in the Multi Asset product portfolio, Business and Investment IT were setting up an investment data warehouse. Additionally, minimum standards for accepting an Overlay mandate needed to be defined from a Business strategic perspective.

As Senior Business Consultant I coordinate all Business task jointly implemented by Investment and IT. Also I define the database specifications before the background of future processes within portfolio management:

- Data flows (positions, transactions, static data, etc.) from custodians to Front Office
- Benchmark constituents delivery from index vendors to Front Office
- Security data accumulation, enrichment and valuation of asset universe
- Definition of best-practice for Overlay Risk Management fund launches
- Handover of self-developed tools and workflows into IT governance.
- Development of margin and collateral preview process within the Front Office tool Bloomberg AIM

02/2014 – 08/2015

Investment Business Services, Allianz Global Investors

Business Specialist Overlay and Fixed Income Portfolio and Risk Management

My task as dedicated specialist for Overlay Portfolio Management was primarily to uncover and cluster risks within the department's processes and data flows. The resulting recommendations had been organized into work stream packages so that a number of projects could be conducted with all involved parties within the asset manager.

The following risks could be removed or at least reduced significantly:

- Establishment of a liquidity monitor to high quality economic view on a fund's cash positions. On basis of all derivatives transactions (ETD and OTC) and all relevant initial margin requirements given by the respective exchanges, I developed a margin and collateral engine. This engine is now used by numerous fund managers to watch their funds for potential overdrafts on their foreign exchange accounts and the bring additional quality to their FX hedges.
- Significant deficits within the CDS and OTC index options workflows, which have been described in my business gap analysis, could be fixed and optimized (esp. valuation topics).
- For the unit “Structured Products” I implemented the following processes:
  - Establishment of a trading connection outside Bloomberg to RFQ Hub for OTC index options, incl. return flow of executions.
  - Technical workflow for an automated straight-through-processing into a. Middle Office and b. respective management cockpit sheet.
- For the unit “Liability Driven Investment” the successfully conducted projects include:
  - Novel process set up for a daily calculation of the Ultimate Forward Rate (UFR).
  - Functional enhancement of the above described liquidity monitor, which is now able to include so-called cash sweeps.
  - Business analysis and project coordination of an automated reconciliation.
- For the units “Risk Management Overlay”, “Protection”, and “Fund of Funds Management”, I implemented a monitoring tool for credit events within the held CDS exposure. After the respective auction, payments are calculated and provided into the operational units.

OTC Business Process Coordinator – Front Office Operations

In order to allow the trading with OTC products to be much faster and more reliable, a new coordinator role had been created. This role accompanies the set up process for OTC from the very beginning (i. e. definition of OTC product list for a particular client, as well as potential counterpart list, plus initial request of credit lines by the identified counterparts, i. e. OTC brokers). Until the coordinator opens a fund for trading OTC and collateral management can start, quite some coordination work needs to be done beforehand (i. e. ISDA agreement, CSA, cash SSI, etc.).

As Senior Business Consultant in charge, I defined the described role as such and could motivate a number of process improvements:

- Owing to the fact that I contacted brokers directly and explained buy side needs in particular to them, counter parties started to be able to react on asset managers needs with improved quality and increased responsiveness.
- I educated PM and other investment professionals as well as operational officers in relevant subjects (i. e. legal framing, collateralization, and so on). By doing so, I could bring existing risks to a much higher attention level, which allowed a cross-functional optimization of the process.
- For the set-up of segregated mandates (DAX listed), I worked as a strategic business consultant for business developers. Therewith I was contributing to a customized but stable process for OTC business in this segment.
- Coordination and, if needed, direct communication with external investment companies, regarding legal documentation like Power of Attorney (PoA) or broker restrictions.
- Covered products: CDS (single name, and CDX / ITRAXX), Interest Rate Swaps (Payer-Receiver), Overnight Swaps (OIS), FX Forwards (Forex, also NDF), Commodity Swaps and Total Return Swaps, Inflation Swaps, OTC FX Options, OTC Equity and Index Options, Equity Forwards

07/2013 – 01/2014

Business Application Management, Allianz Global Investors

Head of Front Office Custom Solutions Europe

Besides one the major tasks, namely, to thin out the naturally grown, highly customized, but hardly standardized Front Office investment tool landscape, the main driver for this team leading role was to strategically design and implement a new, operating European custom solution infrastructure, introducing new processes that allow continuity along established workflows, but under a much more straight-line governance with a reduced number of existing stable standards. I was responsible for numerous projects in Frankfurt/Main, Paris, London, Zurich and Milan, directing a big team (12 as a peak) of business analysts, supporters, and developers in Paris and Frankfurt/Main.

- In charge of approx. 100 custom solution tools dedicated to portfolio management, trading, risk, compliance, research, and Middle Office
- Responsibility for additional, proprietary applications such as Barclays Point, Factset, and UBS Credit Delta
- Strategic business partner for Investment IT to harmonize local European processes
- Maintenance and deployment of self-developed Java framework for main applications

07/2011 – 06/2013

Business Application Management, Allianz Global Investors

Senior Business Analyst

Key requirement for this task was the whole overview regarding Investment processes front to back. Especially the front office application Bloomberg AIM used to be of deeper interest regarding process engineering. Thereby, the anticipation of operational risk that might come with setting up a novel process within the given operational environment, needed to be addressed and discussed in cross-functional project teams.

Following projects or work streams, I accompanied during this role:

- Straight-Through-Process design for OTC products such as CDS and IRS.
- Portfolio migration from Bloomberg POMS to Bloomberg AIM
- Portfolio migration from Decalog to Bloomberg AIM
- Improvement of the cash adjustment process back-to-front

10/2008 – 06/2011

IT Investment Support, Allianz Global Investors

Business Analyst and Front Office IT Coordinator

During my tasks within the IT Investment department, I was able to gather great understanding of investment products and workflows. I also span a quite heterogeneous network of asset management professionals and related industry branches. One particular focus I could make on Multi Asset and systematic products.

- For the department “Master KVG”, I developed a half-automated execution import tool, which is able to read standard BVI format and upload trades and executed transactions into Bloomberg.
- Technical migration within front office sphere after a change within accounting for public funds following Luxembourg law (i. e. SICAV, SICAF).
- Technical portfolio migration and training of new PM who used to work with Decalog in the past (i. e. integration of ComInvest)
- Complete technical migration and extension of multi asset derivative functionality when migrating from Bloomberg POMS to Bloomberg AIM

- Set-up of an incident management workflow (SOX compliant, derived from ITIL standards) within the Test Director tool of HP Quality Center toolbox. Here, I derived analytics from the daily business within Front Office Services, which I reported frequently to management, in order to discuss strategic changes within the department.