



## Executive Summary

Evan is a business and technology leader with extensive experience managing products and systems development in the financial industry. His background includes product management, business-technology liaison, software project and program management, and extensive hands-on experience developing scalable distributed systems for data management and financial analysis.

## Experience

### **Triangle Park Capital Markets Data** 2013 – present

#### *CTO / Head of Technology, Product Manager*

- Developed and launched 3 products for MBIS: (1) consolidated market data feed of pre-trade municipal market data from 10 inter-dealer brokers and alternative trading systems, (2) a comparable securities service leveraging a market-date driven statistical classification algorithm, and (3) a reporting service providing market data analysis using a combination of server-side processing and TIBCO's Spotfire business intelligence platform.
- Managed the relationships for both partners and vendors providing software products and services.
- Provided technical sales support for MBIS products. Sales efforts included the front, middle and back office as well as supporting analysis by quantitative client team.
- Executive board level reporting and presentations.
- Provided professional services for clients through both remote and on-sight management and operational consulting.

### **Bloomberg L.P.** New York, NY 2009 – 2013

#### *Lead Product Manager – BVAL Municipal Evaluated Pricing*

- Directly managed a 20+ person product team and directed the data and development teams through an overhaul of the previously struggling product, leading in initial revenues and subsequent continued growth.
- Developed a business plan for the product, including product strategy, budgeting, materials, and presentation of the plan to the executive management committee. All of the elements of this plan were approved.
- Increased efficiency through workflow analysis and adoption of best practices, allowing the team to handle a 25% greater workload.
- Improved the product based upon a survey of existing and prospective clients, leading to greater acceptance in the marketplace.
- Trained the sales force on the municipal bond market and pricing methodologies, improving their credibility and effectiveness with clients.
- Supported all phases of the sale from initial contact through client training.
- Created innovative quantitative, data-driven models that improved pricing for the most difficult to price securities, increasing overall coverage from 75% to 98%.

## Business Skills

Product Management  
Business Planning  
Management Reporting  
Technical Sales Support  
Project Management  
Program Management  
Requirements Analysis

## Business Knowledge

Capital Markets  
Fixed Income  
Evaluated Pricing  
Regulatory Reporting  
Credit Risk  
Market Risk  
OTC Derivatives  
Basel II  
ASC Topic 820  
OCC 12 CFR

## Technical Skills

Scalable Architectures  
Distributed Computing  
Statistical Analysis  
Agile Development  
Relational Databases  
Object-Relational DB  
Multithreaded Algorithms  
Linux, OS X  
C++, Java Languages  
Eclipse Plugin Dev.  
Mentoring and Training

- Directed the quantitative analysis team to set priorities, vet approaches, and develop metrics to measure efficacy of the valuation models.

**Goldman Sachs and Co., New York, NY** 2004 – 2009

***Vice President – Senior Architect - Credit Risk Technology***

- Guided multiple project teams as well as plans and effort estimates for large-scale system changes.
- Coordinated the core and market risk teams to minimize duplicate efforts. Developed the aggregation methodology for current and potential exposures.
- Designed a high performance, distributed application to analyze credit risk across all OTC derivative products for regulatory reporting and limit management.
- Implemented support for Basel I and Basel II reporting. Redesigned credit systems to improve availability for credit risk reporting to meet FSA deadlines.

***Vice President – Technical Lead - Risk Technology Core Team***

- Promoted best practices through mentoring and pair programming with other developers, code reviews, and development of coding standards.
- Taught classes on advanced Java development.
- Developed a distributed in-memory object database used to support huge data sets produced by a massive collocated server farm using common off-the-shelf hardware.
- Designed highly available, massive memory configuration application servers supporting both daily reporting and interactive user queries.
- Extended a distributed build and testing environment that supported over 50 applications, 30 developers, ~2 million lines of code, and more than 18,000 unit and integration tests.

**Interactive Data, New York, NY** 2002 – 2004

***Business Analyst – Evaluated Services***

- Analyzed the support procedures for fixed-income evaluation services. Developed a new support model based upon a use-case analysis of current procedures. The new model increased efficiency and improved service to the clients.
- Directed requirements gathering efforts for several projects ranging from tactical, group-specific efforts to firm-wide strategic programs.
- Helped to develop a new procedure for the analysis, proposal, approval, and execution of projects on a firm-wide level.

**Merrill Lynch, New York, NY** 2000 – 2002

***Director of New Product Development – Securities Pricing Service***

- Organized and ran the project management office for the business unit.
- Reviewed project requests, performing initial requirements analysis, and facilitating approval and prioritization by the management committee.
- Lead a project to extend the municipal security valuation system to include corporate bond evaluations. Coordinated with sales, trading, and data groups to finalize requirements and establish service level agreements.

**J.P. Morgan, New York, NY** 1999 - 2000

***Consultant – Fixed Income Credit Derivatives***

- Designed a system for calculating the value of credit default swaps for end-of-day processing.
- Helped manage the client relationship, researching supporting technologies, determined the system architecture, estimating project effort, and created the initial project plans.

**Chase, New York, NY** 1998 - 1999

***Consultant – International Fixed Income***

- Developed a calculation server to support high volume, front and back office trade processing for fixed income trades.
- Integrated C++ calculation libraries with CORBA (Orbix) servers written in Java which connected to TIBCO's Rendezvous product (pre-JMS), performed all necessary calculations and updated a database through an object-relational mapping layer.

## Software Skills

Bloomberg Terminal  
TIBCO Spotfire  
Microsoft Project  
Microsoft Word  
Advanced Excel  
Advanced PowerPoint  
Wordpress

## Activities

Ironman Triathlon  
Marathon Running  
Scuba  
Skiing  
Snowboarding  
Woodworking

***Programmer/Analyst – Fixed Income Research***

- Developed a rule-based calculation engine used in a “real-time” automated trading system for government and corporate securities.
- Developed calculation libraries in C++ for fixed income analysis, including the integration of calculators written by the analysts on various trading desks.
- Managed the migration of all libraries for the development team between various compilers and version upgrades.

## Education

**Stevens Institute of Technology**

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Bachelor of Engineering, Electrical Engineering – 1992

Master of Science, Computer Science – 1993

## Publications

- “A Groupings Methodology for Municipal Securities” presented at the Bond Buyer / Brandeis Municipal Finance Conference, July 31, 2014.