

Skilled creative and technology strategist with 10+ years experience in the investment management, market research, brand & communications, and nonprofit sectors, seeking to pivot into the AI space with a focus on safety, alignment, and governance.

## EXPERIENCE

### **The Vanguard Group, Malvern, PA**

#### *Senior UX Strategist - Vanguard Workplace Services*

**July 2022 - present**

- Currently driving creation of internal AI security research team focused on forecasting existential risk impacts to Vanguard and the broader investment industry
- Served as co-lead strategist for an interdisciplinary client experience team tasked with redesigning core investment management software in use by 20M investors
- Strategized and executed \$1B modernization of critical client infrastructure using human-centered design, Agile, qualitative and quantitative research, contributing to 15-point increase in NPS over 3 years
- Oversaw design and rollout of 20+ new digital features and operational processes in partnership with external and offshore vendors

#### *Brand Strategist - Global Brand Marketing*

**July 2021 - July 2022**

- Developed and executed \$80M brand campaign from concept to execution, inclusive of creative strategy, media, and measurement, driving 11-point increase in brand favorability
- Spearheaded and wrote \$1.3M sponsored content program with partners including New York Times, The Economist, and iHeart Radio, resulting in podcasts, articles, interactive reports, and audio features garnering over 10M views
- Conducted market, semiotic, creative, competitive, and copy-test research to develop fundamental brand and messaging strategies

#### *Senior Automation & Digitization Consultant - Retail Automation & Digitization*

**May 2020 - July 2021**

- Managed an interdisciplinary team focused on automation of high-risk money movement processes
- Automated high-volume manual wire transfer processes, increasing efficiency by 67% and eliminating ~600k fail points annually
- Codified standardized frameworks for identification, prioritization, and execution of risk mitigation recommendations
- Identified and distributed 100+ monetary transaction risk mitigation automation recommendations and opportunities

#### *Innovation Specialist - Vanguard Innovation Studio*

**June 2019 - May 2020**

- Drove ideation and development of novel financial services products across all client segments
- Conducted in-depth analyses of product concepts against multiple strategic and evaluative frameworks
- Employed human-centered design, Agile, and Lean frameworks to manage and execute multiple concurrent workstreams

### **Forrester Research, Cambridge, MA**

#### *Senior Research Associate - Application Development & Delivery*

**June 2017 - December 2018**

- Conducted primary research and project managed 40+ vendor evaluations, market analyses, and research reports covering enterprise digital transformation, digital experience, and business model design
- Project managed and coordinated research for company-wide innovation project developing new IP distribution methods

### **Combined Jewish Philanthropies, Boston, MA**

#### *Associate - Young Adult Initiative*

**April 2014 - June 2017**

- Provided logistical support for senior leadership, including planning and execution for 50+ events, management of a 3,000-donor database, weekly donor communications and daily social media management
- Participated in cross-departmental database development resulting in implementation of new company-wide CRM

### **Dunc's Mill, St. Johnsbury, VT**

#### *Creative Director*

**September 2013 - August 2015**

- Developed new brand position for high-growth microdistillery, resulting in full rebrand of entire product line
- Created and executed complete go-to-market strategy, resulting in sustainable profitability and eventual acquisition of company
- Recruited and managed salespeople and expanded sales territory throughout New York, Massachusetts, Vermont and Connecticut

## EDUCATION

#### **BlueDot Impact**

Certificate - AGI Strategy

**April 2026**

#### **CFA Institute**

Certificate - Investment Foundations Program

**May 2020**

#### **Boston University**

B.A. with Distinction in History

**May 2012**