

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

Boston University

B.A. with Distinction in History

May 2012

CFA Institute

Certificate - Investment Foundations Program

May 2020

BlueDot Impact

Certificate - AGI Strategy

April 2026