

PHILIP A. JONES, Ph.D.

25 Cove Point Road
Sarasota, Florida
pjones@yahoo.com

Home: 941-555-7736
Pager: 941-555-6167
Cell: 502-555-6167

MODELING – ANALYTICS – IT PROFESSIONAL

**Designing, Development & Applying Sophisticated Modeling & Analysis Methodologies
Linked to High-Performance IT Solutions to Achieve Dynamic Impacts on
Corporate Planning, Strategy, Operations, Business Initiatives, Competitive Performance & Financial Reporting**

PROFILE

Uniquely qualified by the combination of: advanced degrees in Mathematics, Probability and Statistics; extensive experience in IT Solutions Development and Projects Management; strong orientations in Finance, Operations, Business Development, Marketing, Client Relations; high-caliber management qualifications and proven leadership talents. Extremely analytical with broad perspective, big-picture vision and laser focus on details. Logical, methodical problem solver – guru decision maker – consistently successful in providing innovative solutions to complex business, technology and mathematical problems. Excellent communication skills – capable of translating complex technical and mathematical concepts to non-technical individuals.

QUALIFICATIONS & EXPERTISE

**Modeling – Data, Object, Analytic, Probabilistic
Quantitative & Qualitative Analytics
Strategic & Tactical Analytics
Pattern Recognition Risk / Benefit Analysis
Project & Team Management**

**Algorithms – Mathematic, Probabilistic & Deterministic
Statistical Calculation, Analysis & Reporting
Scientific Computing & Informatics
Financial Research & Analysis
Data Interpretation & Presentation**

PROFESSIONAL EXPERIENCE

MARSH FINANCIAL SERVICES, Minneapolis, Minnesota

1995 to May 2002

VICE PRESIDENT - DIRECTOR OF IT (1997 to 2002)
MANAGER – FINANCIAL & MODELING ANALYSTS (1997 to 2002)
ANALYST (1995 to 1997)

Key member of the executive team, holding two management positions for this \$25 million financial services firm specializing in innovative, client-centric investment planning, risk/liability financing, executive compensation and wealth preservation solutions. Held direct accountability for developing and executing the corporate IT strategy, and managing all related systems and solutions (e.g., software design, development and enhancement; programming; business, finance, analytics applications; database design and administration; Internet/Intranet hosting, website design and content development; VPN; eBusiness security) for both back-office operations and front-end product/service offerings.

Delivered IT support to back-office business operations (15 regional offices, + users) and developed sophisticated applications and solutions for front-end product/service offerings. Led a core IT group of six, established resource requirements and administered \$500,000 annual IT budget. Interfaced routinely with divisional and corporate executives, product development teams, finance professionals and client representatives. Provided technical, fiscal and managerial oversight to all IT projects and teams.

MANAGEMENT ACHIEVEMENTS:

- Succeeded in meeting/exceeded all internal and external customer requirements, concurrent with completing several complex projects despite limited resources and severe financial constraints.
- Assumed the role of “internal consultant” on issues related to IT and “subject matter” expert in complex modeling, analytics, statistics and data reporting. Key point of contact to Corporate IT Group.
- Contributed business and IT advisory and support services for numerous corporate development transactions. Managed post-deal integration of IT platforms, systems and teams for three M&A transactions.
- Brought technical credibility and interactive, motivational leadership to the IT organization. Upgraded and formalized the software design and development process, IT project lifecycle and documentation requirements. Placed primary focus on best-practice concepts, cost effectiveness and performance.

MODELING & ANALYTICS:

- Managed projects and teams related to complex, business-critical financial modeling and analytics in support of the firm's core product/service offering. Built, mentored and supervised a staff of four.
- Contributed expertise in financial modeling and analytics as a value-added resource to clients. Collaborated with Financial Advisors and Consultants in client presentations and advisory sessions.
- Performed modeling and analysis of financial instruments and products for the securities and insurance brokerage industry, including, not limited to: mutual funds; stock options; qualified and non-qualified pensions; 401(K); life insurance/corporate owned life insurance, and related accounting/reporting requirements and tax strategies/impacts.
- Leveraged IT and personal knowledge to improve the quality of modeling and analysis – from simplistic deterministic modeling techniques to sophisticated methodologies including numerical analytics, simulation, and statistical analysis, predictive analysis – enabling the firm to be more competitive while providing it with information crucial to internal risk, profitability and liquidity positions.
- Enhanced website exhibits and sales/marketing collateral with comprehensive analytics - statistics, benchmarks, trend/variance analyses, performance analysis, predictive analyses, comparative analyses - using regression testing, decision trees, neural networks and statistical packages.

IT PROJECTS & SOLUTIONS:

- Financial Analysis & Reporting – Standardized, identified and resolved calculation errors in complicated financial functions corporate-wide. Developed a single-code IT solution, integrating the financial functions into existing commercial applications (e.g., programmed COM+ application in Visual Basic/ Visual C++ for SQL Server, Excel, Word, Lotus Notes, and Outlook).
- Software Design & Development – Programmed proprietary Visual Basic/Visual C++ applications to record pension balances, stock options, and life insurance and to allow customers interactive financial models.
- Organization & Operations – Planned and managed integration/consolidation of IT platforms, systems and applications for two regional office operations resulting in a common platform and single business model for administering pension and variable life insurance benefits.
- Database Solution/Data Migration – Created a decision support solution by consolidating disparate business and financial data into a high-performance database solution. Managed all aspects of this high-profile project and led a three-person team in data migration phases.
 - Eliminated errors and reduced data processing/reporting time from as much as 15 minutes to as little as 30 seconds.
 - Provided senior management, for the first time, with accurate, meaningful and timely decision-making information.
 - Utilized MS SQL Server, Replication and Microsoft Analysis Tools.
- Website Development - Completed the conceptualization, design, development and implementation of state-of-the-art website in less than nine months with bare-bones budget (\$50,000 actual against \$70,000 estimated).
 - Built the site to provide clients with critical account information (pension balances, trading activities and analytics) to enhance cross-selling and customer-perceived value on behalf of the firm.
 - Programmed and integrated key business factors – password policy, security, privacy, notifications, cross-selling links.
 - Effort was credited with facilitating \$500,000 in new business within six months.
 - Utilized MS SQL Server, COM+ written in Visual Basic/Visual C++, transaction servers, Microsoft ASP, JavaScript, Flash 5.0, XML.

EDUCATION

PhD – Mathematics, Concentrations in Probability, Statistics & Algorithms, 1995

MA – Mathematics, Concentrations in Probability & Statistics, 1993

CPUs - Pattern Recognition & Scientific Database Theory, Enterprise Java Beans, 1998/2001

UNIVERSITY OF MINNESOTA – Minneapolis, Minnesota

MA – Mathematics, Concentrations in Probability, Statistics & Algorithms, 1991

BA – Mathematics, Concentrations in Probability & Statistics, 1989

OXFORD UNIVERSITY - Oxford, England

CERTIFICATIONS & CREDENTIALS

MCSE, MCSA, MCDBA – Microsoft Certifications

OCP/Oracle Certified Professional

SAS Version 8 Certification

Series 6 and Series 63 – NASD