

STRENGTHS

- Governed Architecture**
Built a commercial platform blueprint where definitions, ownership, lineage, and change decisions stayed visible.
- Financial Modeling**
Modeled loans, funds, instruments, and benchmarks; peers sought guidance when relationships became unclear.
- Entity Resolution**
Created survivorship and hierarchy rules across conflicting sources, turning duplicate records into trusted entities.
- Cross-Team Delivery**
Worked beside engineers, platform teams, and quantitative leaders; shared model reviews kept delivery practical.
- Privacy-Aware Design**
Advised governance committees on aggregation and anonymization, preserving analytical value without overlooking data restrictions.

SKILLS

- Data architecture
- Logical data modeling
- Physical data modeling
- Master data management
- Entity resolution
- Taxonomy governance
- Metadata management
- Data lineage Schema governance
- Change control Data Vault
- Dimensional modeling
- Graph modeling
- Benchmark governance
- Privacy-aware modeling

SUMMARY

Data Architect with 14 years shaping governed data platforms, logical and physical models, and master data strategies across financial services, fund administration, and regulated reporting. Builds trusted foundations for loan portfolios, **credit instruments**, fund structures, benchmarks, indexes, and client reports. Combines Data Vault, dimensional, and graph-based modeling with **metadata management**, lineage, **taxonomy governance**, **entity resolution**, schema evolution, and privacy-aware aggregation. Partners closely with quantitative leaders, data engineers, platform engineers, compliance teams, and product owners, turning fragmented source ecosystems into reusable, auditable data products. Eager to bring practical architecture leadership to Northstar Financial Data Services, helping define a canonical commercial data platform where every field, relationship, metric, and published output carries clear meaning and traceability.

EXPERIENCE

Principal Data Architect

Crescent Harbor Data Partners January 2022 - Present Chicago, IL

Owns architecture for a commercial financial data platform, guiding canonical models, governance, lineage, taxonomy, and master data across product domains. Partners with engineering, platform, quantitative, compliance, and product leaders to convert diverse sources into reusable, auditable outputs.

- Defined **logical blueprint** for **financial data** platform integrating administration, filings, and client portfolios.
- Directed **Data Vault** and dimensional models supporting benchmark, index, credit, and fund product outputs.
- Implemented Collibra metadata, lineage, dictionaries, and ownership mappings for auditable client reports.
- Formalized entity resolution, survivorship, conflict handling, and hierarchy rules across financial source systems.
- Governed **schema evolution** through **version control**, impact reviews, deprecation plans, and breaking-change approvals.
- Advised privacy committees on anonymization, aggregation thresholds, **classification rules**, and regulated benchmark distribution.

Senior Data Architect

Blue Meridian Fund Administration March 2018 - December 2021 New York, NY

Led domain architecture for administrator operations and institutional reporting, covering **fund structures**, loans, facilities, accounts, and performance measures. Connected business meaning with engineering delivery through governed taxonomies, integration patterns, metadata, lineage, and model review.

- Owned domain models for funds, **loan portfolios**, facilities, investor accounts, and performance measures.
- Replaced spreadsheet definitions with governed taxonomy and reusable glossary across 20 **data products**.
- Designed logical integration patterns for administrator, custodian, regulatory, and client holdings sources.
- Translated benchmark requirements into auditable attributes, calculation inputs, **lineage relationships**, and output contracts.
- Introduced **Alation** metadata practices linking transformation logic, quality rules, source fields, and report measures.
- Resolved relationship ambiguity during migrations while preserving backward compatibility across downstream data products.

Data Modeler / Architect

Pioneer Credit Infrastructure July 2015 - February 2018 Charlotte, NC

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



- Principal Data Architect at Crescent Harbor Data Partners (4.7 Years)
- Senior Data Architect at Blue Meridian Fund Administration (3.8 Years)
- Data Modeler / Architect at Pioneer Credit Infrastructure (2.6 Years)
- Data Architect at Ridgeway Financial Systems (1.8 Years)
- Data Analyst / Modeler at Hearthstone Analytics Group (1.1 Years)

- Designed shared financial models for lending, securitized assets, collateral, counterparties, and servicing events. Established reusable keys, hierarchies, mappings, classifications, and privacy controls that supported regulatory extracts and client analytics.
- Developed logical and physical models for lending, securitized assets, collateral, counterparties, and servicing events.
 - Applied **dimensional modeling** and **Data Vault** patterns for durable keys and changing attributes.
 - Created matching and hierarchy rules for borrowers, obligors, legal entities, facilities, and instruments.
 - Documented source mappings, transformation assumptions, and quality controls for regulatory and client analytics.
 - Established naming standards, field definitions, classifications, and schema reviews for incremental releases.
 - Evaluated **anonymization** and **aggregation** approaches for useful, privacy-aware portfolio extracts.

Data Architect

Ridgeway Financial Systems 📅 August 2013 - June 2015 📍 Boston, MA

- Supported a **financial infrastructure provider** through models spanning fund accounting, holdings, cash activity, and credit exposure. Built shared definitions, lineage, reference data, and controlled release practices for asset managers and administrators.
- Modeled fund accounting, holdings, cash activity, and credit exposure for financial **infrastructure** clients.
 - Converted requirements into ER/Studio and SQL Server models with keys, constraints, and relationships.
 - Built metadata catalog and dictionary for entities shared by product, analytics, development, and reporting.
 - Mapped custodian and administrator files through staging, transformation, warehouse, and client reporting layers.
 - Assessed downstream dependencies and migration plans for controlled schema changes and releases.
 - Resolved duplicate records through survivorship rules and reference-data stewardship for portfolio reconciliation.

Data Analyst / Modeler

Hearthstone Analytics Group 📅 June 2012 - July 2013 📍 Atlanta, GA

- Analyzed loan and fund data under senior architecture review, preparing models, mappings, profiles, and taxonomy recommendations for repeatable benchmark and portfolio reporting. Built early expertise in **financial data** quality, historical structures, and governed definitions.
- Analyzed loan and fund datasets for recurring entities, gaps, classifications, and reporting relationships.
 - Produced conceptual and logical models for positions, borrowers, facilities, securities, and valuation events.
 - Profiled source files with SQL and Python, documenting duplicates, nulls, conflicts, and exceptions.
 - Created source-to-report mappings and field definitions supporting repeatable **benchmark** and portfolio reporting.
 - Tested dimensional structures against client questions, validating grain, aggregation, drill paths, and history.
 - Presented taxonomy recommendations to analysts and implementation teams under senior architecture review.

PROJECTS

Canonical Financial Data Platform 📅 2025

Good architecture starts with meaning, not machinery. Defined a reusable canonical model connecting administration data, filings, portfolios, benchmarks, indexes, and client outputs through governed lineage, taxonomy, and schema evolution.

Privacy-Aware Benchmark Distribution Model 📅 2023

Useful data earns trust when its boundaries are clear. Shaped anonymization, aggregation, classification, and audit controls for regulated benchmark and index distribution across varied consumer needs.

LEADERSHIP & AWARDS

- DAMA Chicago Chapter Data Governance Excellence Award, 2024
- Pioneer Credit Infrastructure Architecture Impact Award, 2017
- Georgia State University Graduate Research Fellowship, 2011

EDUCATION

Master of Science in Information Systems

Georgia State University 🎓 GPA: 4.0 📅 2012 📍 Atlanta, GA

Coursework: *Data architecture, database management, information governance, systems analysis*

CERTIFICATIONS

- Certified Data Management Professional (CDMP) 📅 2019
- Collibra Ranger Certification 📅 2023

TECHNICAL SKILLS

- **Data Modeling:** Logical modeling, Physical modeling, Dimensional modeling, Data Vault
- **Graph Data:** Graph-based modeling, Entity relationships, Knowledge graphs
- **Master Data:** Master data management, Entity resolution, Survivorship rules
- **Metadata Platforms:** Collibra, Alation, DataHub
- **Database Tools:** SQL Server, SQL, ER/Studio
- **Governance Standards:** Data dictionaries, Taxonomies, Classification systems
- **Lineage Management:** Source-to-target mapping, Lineage documentation, Audit trails
- **Schema Management:** Canonical schemas, Schema versioning, Breaking-change control
- **Financial Data:** Loan portfolios, Credit instruments, Fund structures
- **Privacy Controls:** Anonymization, Aggregation design, Privacy constraints
- **Regulated Data:** Regulatory filings, Benchmark governance, Controlled reporting
- **Programming:** Python, SQL, Data profiling

PROFESSIONAL AFFILIATIONS

- Financial Services Data Governance Roundtable Chair, DAMA Chicago Chapter, 2024 - Present
- Mentorship Volunteer, Data Management Association Chicago Chapter, 2021 - Present
- Contributor, Financial Data Standards Working Group, 2018 - 2020

ADDITIONAL INFORMATION

Work Status : Authorized to work in United States. No sponsorship required.

REFERENCES

AVAILABLE ON REQUEST