



George Chandler

Senior Product Associate, Account Opening and Activation

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STRENGTHS

- ♥ **Account Opening Delivery**
Led identity, disclosure, funding, and status work together. Partners trusted clear decisions when onboarding details became difficult.
- 💡 **AI Assisted Product Work**
Used Copilot, Claude, and ChatGPT for drafts and edge cases. Teams gained speed without losing product judgment.
- 📌 **Evidence Based Prioritization**
Connected funnel, abandonment, and service data with experiments. A recurring question became a clearer product decision.
- 👥 **Cross Functional Partnership**
Worked with design, engineering, architecture, compliance, and operations. Stronger alignment followed practical requirements sessions.
- 📁 **Knowledge Management**
Created decision records and searchable history. Colleagues found rationale faster, especially during release discussions.

SKILLS

Product Management

Product Ownership

Account Opening Brokerage

Agile Scrum Roadmaps PRDs

User Stories Product Analytics

UX Prototyping

Knowledge Management

SUMMARY

Senior product professional with five years delivering digital financial products across brokerage onboarding, **account opening**, activation, and client servicing. Leads Agile delivery from discovery through release, translating stakeholder needs, research, data, and architecture constraints into PRDs, epics, user stories, **acceptance criteria**, experiments, and roadmap decisions. Partners closely with UX designers, engineers, architects, compliance, operations, clients, and advisors to shape controlled digital experiences that balance usability, risk, and delivery feasibility. Uses GitHub, GitHub Copilot, Claude, and ChatGPT for requirements drafting, documentation, knowledge repositories, edge case analysis, **interactive wireframes**, and **proof of concept demos**. Product analytics and structured experimentation guide prioritization, while decision logs preserve institutional knowledge. Brings practical curiosity, clear communication, and steady ownership that can support thoughtful account opening and activation outcomes.

EXPERIENCE

Senior Product Associate, Brokerage Onboarding

Northbridge Digital Investing 📅 July 2024 - Present 📍 Jersey City, NJ

Owns product delivery for brokerage onboarding and activation journeys, coordinating roadmap scope, discovery, documentation, experimentation, and releases across product, design, engineering, architecture, compliance, and operations. Uses **AI productivity tools** to improve product craft while keeping decisions accessible as a reliable institutional reference.

- Owned brokerage **activation** scope across identity, disclosures, funding readiness, and account status workflows.
- Converted research and architecture constraints into PRDs, epics, **stories**, and testable acceptance criteria.
- Built an AI assisted repository containing **requirements history**, decision logs, documentation, and prompt templates.
- Used **GitHub Copilot**, Claude, and ChatGPT for discovery synthesis, edge case analysis, drafts, and prototypes.
- Partnered with UX and engineering on wireframes and proof of concept onboarding flows.
- Used funnel and defect data to refine experiments, prioritization, and client experience decisions.
- Coordinated sprint readiness, dependencies, **releases**, and architecture discussions across six partner teams.

Product Analyst, Digital Accounts

Crescent Bay Financial 📅 September 2021 - June 2024 📍 Newark, NJ

Supported digital account product management through funnel analysis, requirements facilitation, backlog health, experimentation measurement, release documentation, and searchable decision records. Presented evidence based recommendations that balanced client experience, operational controls, compliance needs, and technical feasibility.

- Analyzed application funnels, abandonment, service contacts, and activation issues to identify product opportunities.
- Facilitated **requirements sessions** and produced stories, process flows, **acceptance criteria**, and release documentation.
- Maintained backlog health, refinement materials, epic progress, and dependency visibility for digital accounts.
- Created dashboards and **measurement** plans for onboarding experiments and operational outcomes.
- Developed searchable decision and requirements documentation that preserved rationale across product and technology teams.
- Presented analysis, prototypes, and **prioritization** recommendations for client and advisor experience improvements.

Prompt Engineering

AI Productivity Tools

LANGUAGES

English Native

Spanish Intermediate

MY CAREER



● Senior Product Associate, Brokerage Onboarding at Northbridge Digital Investing (2.2 Years)

● Product Analyst, Digital Accounts at Crescent Bay Financial (2.8 Years)

- Balanced controls, feasibility, **stakeholder needs**, and measurable outcomes during **account opening** planning.

PROJECTS

Digital Account Activation Insights 📅 2024

Turned fragmented funnel signals into a clearer activation story. Built measurement views and decision notes that helped partners discuss abandonment, service contacts, and next product experiments with shared context.

AI Product Knowledge Repository 📅 2025

Started with a recurring documentation challenge and shaped it into a searchable working resource. Combined decision logs, requirements history, prompt templates, and product notes for faster team discovery.

LEADERSHIP & AWARDS

- Promoted to Senior Product Associate after demonstrating ownership across brokerage onboarding delivery and cross team releases.
- Recognized by product and engineering partners for clear requirements, practical prototypes, and dependable decision documentation.
- Selected to shape AI assisted product workflows using GitHub Copilot, Claude, and ChatGPT.

EDUCATION

Bachelor of Science in Business Analytics

Rutgers University 🎓 GPA: 3.7 📅 2021 📍 New Brunswick, NJ

Coursework: *Product analytics, statistics, database management, business intelligence*

CERTIFICATIONS

- Certified Scrum Product Owner 📅 2023
- Google Data Analytics Professional Certificate 📅 2022

TECHNICAL SKILLS

- **Product Management:** Product ownership, PRDs, roadmaps
- **Agile Delivery:** Agile, Scrum, sprint planning
- **Backlog Management:** Backlog grooming, epics, releases
- **Requirements Analysis:** User stories, acceptance criteria, process flows
- **AI Productivity Tools:** GitHub Copilot, Claude, ChatGPT
- **Product Analytics:** Funnel analysis, dashboards, measurement plans
- **Rapid Prototyping:** Interactive wireframes, proof of concept demos, experimentation
- **Knowledge Management:** Decision logs, requirements history, searchable repositories
- **Financial Platforms:** Brokerage onboarding, digital accounts, self directed investing
- **Collaboration Tools:** GitHub, documentation systems, presentation tools

PROFESSIONAL AFFILIATIONS

- Product community participant focused on current product craft, AI workflows, and digital financial experiences.
- Agile practitioner who shares backlog refinement methods, experiment learnings, and documentation habits with product peers.

ADDITIONAL INFORMATION

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

REFERENCES

AVAILABLE ON REQUEST