

MICHAEL ANDERSON

Robo Advisory Strategy Lead

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Visionary Robo Advisory Specialist with a profound understanding of the intersection between technology and financial services. Expertise in creating innovative robo-advisory solutions that enhance user experience and drive client engagement. Proven ability to leverage data analytics for informed decision-making and strategic planning. Recognized for a strong track record in project management and team leadership within the fintech sector.

WORK EXPERIENCE

Robo Advisory Strategy Lead | Future Finance Technologies

Jan 2022 – Present

- Developed strategic initiatives to enhance the firm's robo-advisory offerings.
- Conducted market research to identify gaps in current service delivery.
- Collaborated with product teams to design innovative investment solutions.
- Led cross-departmental meetings to align strategies with organizational goals.
- Monitored industry trends to inform strategic development and implementation.
- Facilitated client workshops to gather insights and feedback on services.

Operations Analyst | WealthTech Advisors

Jul 2019 – Dec 2021

- Analyzed operational processes to identify efficiency improvements.
- Assisted in the implementation of automated workflows for client onboarding.
- Conducted data analysis to support decision-making and strategy development.
- Prepared detailed reports on operational performance for management review.
- Collaborated with IT teams to enhance system functionalities.
- Provided training to staff on new operational procedures and technology use.

SKILLS

Strategic planning

Market research

Data analytics

Project management

Team leadership

Client engagement

EDUCATION

Master of Science in Financial Technology

2015 – 2019

New York University

ACHIEVEMENTS

- Successfully launched a new advisory product that increased market share by 25%.
- Achieved recognition for excellence in project management at the annual industry awards.
- Increased client engagement levels by 35% through innovative service enhancements.

LANGUAGES

English

Spanish

French