

## EXECUTIVE SUMMARY

An **operations excellence** and **strategic relationship management** expert with 7+ years of experience in the back office and retail sides of banking. An innovative team player who puts ideas into action by leading team members, working cross-functionally, and focusing on the bottom line. An excellent communicator who is fluent in English and Arabic and has experience working with institutional investors like PIMCO, the Carlyle Group, and Bridgewater Investments, with hedge funds, and with high net worth individuals.

## FUNCTIONAL EXPERTISE

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- **Strategic Relationship Management**
- **Process Improvements**
- **Risk Management**
- **Cross-functional Communications**
- **Motivating and Leading Teams**
- **Vendor Management**

## FUNCTIONAL EXPERTISE DEMONSTRATED

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JP MORGAN CHASE BANK

2010-2017

*Vendor Management Manager—Capital Markets (2016-2017)*

Hand-picked by the VP of Process Improvement to lead a review of JP Morgan Chase Capital Markets' relationship with 9000 data and software vendors.

- **Vendor Management:** Hand-picked to lead a review of 8 divisions' relationships with 9000 data and software vendors. Identified 200 "material relationships" that represented 80% (~\$2bn) of RBC Capital Markets' annual vendor spend and took special efforts to review these relationships with particular scrutiny. After reporting findings to the Senior Leadership Team and working cross-functionally to make recommendations to each division, Capital Markets realized more than \$2 million in annual savings.
- **Cross-functional Communications:** Liaised with the VPs of 8 internal departments and their staff to catalog and review their relationships with existing data and software vendors to map key processes, propose cost-savings solutions, and report findings to the Capital Markets Senior Leadership Team.
- **Process Improvements:** Following the review of Capital Markets' vendor relationships, innovated an automated vendor management tool that alerts department when vendor agreements are soon to auto-renew, enabling departments to use these renewal events as opportunities to review, change, cancel, or renegotiate relationships with service providers. This tool was presented to the VP of Process Improvements, implemented in coordination with the Company's SAP service team, and is still in use.

*Operations Specialist, Capital Markets Foreign Exchange Desk (2012-2016)*

Interfaced with FX traders and counterparties to ensure trade accuracy and that collateral requirements were met, overseeing thousands of trades per day for the Toronto, London, and New York prime brokerage desks.

- **Strategic Relationship Management:** Successfully managed relationships with counterparts at institutional funds like PIMCO, the Carlyle Group, and Bridgewater Investments and with smaller hedge funds, ensuring that a book of 500 clients provided Capital Markets with adequate collateral to execute trades requested.
- **Risk Management:** Worked with the Global Link system, regularly following on ~50 non-matching trades per day to limit the Capital Markets FX Group's exposure to operational risk. E.g. discovered a trading mistake that resulted in an erroneous transfer of \$200 million to a client, alerting the counterparty to the mistake and recapturing the capital on the same day, saving RBC Capital Markets thousands of dollars. Recognized for

Outstanding Final Performance by the Bank in 2010.

*Team Lead of Account Services, Retail Banking Group (2010-2012)*

Led the customer services team for the Royal Bank Plaza retail branch of JP Morgan Chase, leading a team of 8 and reporting to the Branch Manager. Specialized in VIP customer service.

- **Strategic Relationship Management:** Facilitated ~50 transactions per day for VIP customers (those with between \$1 million and \$5 million), advising clients on investment products available from the Bank, facilitating international transactions, and providing excellent customer service.
- **Motivating and Leading Teams:** Led daily team huddles, motivating the customer service team, coaching the team on how to sell new products, training them on systems changes, and recognizing exemplary performance. Nominated for the Chase Performance Award in 2007.

*Customer Service Representative, Retail Banking Group (2010)*

Provided excellent customer service to retail banking clients at the Royal Bank Plaza retail branch, facilitating transactions of up to \$100,000.

- **Process Improvement:** Created a performance management tool that recorded the selling histories of all branch customer service representatives, enabling the Branch Manager to review the performance of each representative on a monthly basis. This tool is still used today by the Branch.

## EDUCATION

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**Master of Business Administration (Global Finance).** INSEAD Business School (Paris, France)

**BA (Management of Information Systems).** American University of Science and Technology (Beirut, Lebanon)

## OTHER RELEVANT INFORMATION

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**Languages:** English (native), Arabic (native), French (conversational)

**Technical Skills:** SAP, Global Link, MS Office Suite including Excel (master)

**Certifications:** CIFSC-Canadian Investment Funds Certified