



**Design leader**  
**Product design**  
**UX/UI design**  
**Design systems**  
**Web design**  
**Brand identity**

**I'm a product designer and design leader with over 15 years of in-house and consulting experience.**

With tested expertise in designing and realizing digital experiences for ambitious companies within the fintech and entertainment sectors, I've built, led, and mentored high-functioning teams that delivered award winning products and digital experiences for clients big and small.

Past clients and collaborators include JP Morgan Chase, Wells Fargo, Citibank, Merrill Lynch, Huntington Bank, T. Rowe Price, Capital Group, Ameriprise, Mercer, Westwood, and Glenmede.

[View Portfolio](#)

# Work Experience

Continue



## VP, Global Head of Design

[InvestCloud, Inc.](#) MAR 2021 - OCT 2023 (2 YRS 8 MOS)

- Led a global team of 17 talented designers, overseeing design direction, design reviews, coaching, design operations, design systems, file organization, design processes, and team scheduling and communications.
- Set the vision and direction for our global design team. Developed a scalable design system with design principles and guidelines to ensure consistency across all product designs and client deliverables.
- Fostered a culture of innovation, collaboration, and continuous improvement. Inspired and mentored designers to deliver their best work with bi-weekly 1-on-1s and design reviews.
- Collaborated closely with business stakeholders, clients, product managers, engineers, and QA to ensure seamless design and product development and client deliveries.
- Collaborated with sales and pre-sales to design unique customer digital experiences to fulfill the business needs of our customers ranging from multi-million dollar Tier 1 sales deals with some of the largest banking and wealth managers in the world to smaller Mid-Market deals. These would often include multi-day on-site client meetings.

## Director, Product Design

[InvestCloud, Inc.](#) MAY 2019 - MAR 2021 (1 YR 11 MOS)

- Recruited, lead, and nurtured a high-performing design team.
- Developed design systems and guidelines to ensure consistency across all product designs.
- Spearheaded numerous product designs, including Advisor-led Financial Planning, UK Financial Advice, CRM, Investor Portal, and Advisor Portal.

## Senior Product Designer

[InvestCloud, Inc.](#) FEB 2017 - MAY 2019 (2 YRS 4 MOS)

- Served as the primary designer for several global Tier 1 client projects, including P Morgan Chase, Wells Fargo, Citibank, Huntington Bank, Capital Group, Ameriprise, Westwood, and Glenmede.
- Lead design efforts for multiple marketing projects, including brand guidelines, pitch decks, marketing website, annual conferences, social media templates, tear sheets, email newsletters, and more.



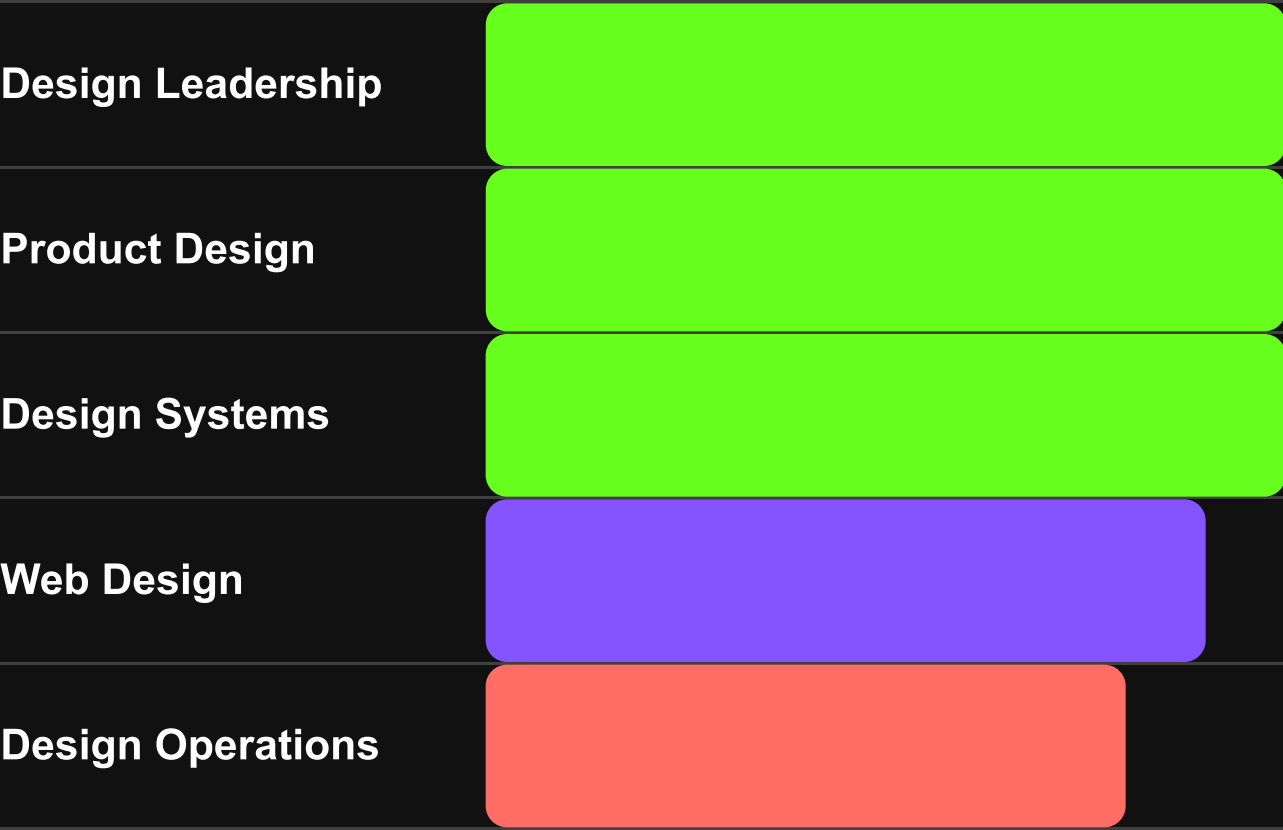
## Work Experience (cont.)

### Manager, Design & Print Production

[Greydog, Inc.](#) AUG 2014 - FEB 2017 (2 YRS 7 MOS)

- Responsible for design concepts, layouts, and models of compelling custom products for clients such as trade show booths, vehicle graphics, window graphics, menu boards, banners, POPs, shop-in-shops, trophies, and more.
- Developed company branding, marketing assets and company website.
- Worked closely with Foreman, Project Managers, and other department heads to successfully execute production workflow from start to finish.
- Managed day-to-day operations including customer relations, workflow distribution, and coordination of completed products for delivery, pack- out, and/or installation.

### Top Skills



## Tech Skills

Figma

Sketch

InVision

Abstract

Adobe Creative Suite

Miro

HTML & CSS

Webflow

Wordpress

Microsoft 365

Jira

## Design Skills

UX Design

UI Design

Wireframes

Rapid Prototyping

Web Design

Mobile Design

Front-End Development

Creative Direction

Art Direction

Typography

Graphic Design

Environmental Design

Brand Identity

## Education & Awards

### University of California, Irvine

[Bachelor's Degree \(Summa Cum Laude\)](#) STUDIO ART

### Best Client Communication Solution (Pan-Asia) (Winner)

[Wealth Briefing Asia Awards 2023](#) INVESTCLOUD, INC. JUNE 2023

### Undergraduate Research Opportunity Program

[University of California, Irvine](#) MARCH 2011

### Print Production Coordinator

[Greydog, Inc.](#) JUN 2011 - AUG 2014 (3 YRS 3 MOS)

### Print Production Specialist

[Greydog, Inc.](#) SEP 2007 - JUN 2011 (3 YRS 10 MOS)

### Web Design Consultant

[Fearless Records](#) APR 2013 - OCT 2016 (3 YRS 7 MOS)

### Design Consultant

[Freelance](#) SEP 2009 - FEB 2017 (3 YRS 7 MOS)