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BUSINESS ADVISOR / INTERIM MANAGER (FINANCIAL SERVICES)

A well networked, financially astute Business Advisor, Operational and Interim Manager with a proven track record of making business compliant and expediting systems, whilst increasing efficiencies, profits, staff morale and retention. Most recently, launching investments, solving integrity and inconsistency issues, securing company image and productive partnerships. Now looking to make a continued significant contribution for a company that offers a similar challenging senior appointment preferably on a contract or interim basis.

AREAS OF EXPERTISE

- Trouble Shooting / Problem Solving
- Systems and Procedure Development
- Product Launches
- Feasibility Studies
- Leadership / Team Development
- Customer Service
- Compliance
- Reducing Costs
- Business Analysis
- Change Management
- Operational Management
- Quality Assurance

EDUCATION

BSc. (Hons)	Mathematics	1977-80
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PROFESSIONAL EXPERIENCE AND SIGNIFICANT ACHIEVEMENTS

CUSTOMER SERVICE MANAGER

Feb - Aug 2011

Skandia UK (maternity cover/ contract):

- Involved in running 4 teams (60 people) with responsibility for processing switches, disinvestments and regular payments during a period of significant change, cost management constraints and company restructuring.

INTERIM MANAGER / CONSULTANT

Sep 2009 - Feb 2011

Skandia International (contract: Mar 2010-Feb 2011):

- Provided support to an international investment proposition team.
- Launched the investment side of new bonds into Spain, (fund range, fund manager agreements, signing off literature, procedures), as well as other new protected product launches into South America and Middle East.
- Supported the restructure of internal funds in Finland and closed a range of international broker funds across the Group.
- Solved a number of MI data integrity and inconsistency issues within factsheets, plus ad hoc investment related matters.
- Re-engineered processes relating to the transfer of work from Guernsey to the IoM, and established revised fund related procedures as a result of this transfer.
- Involved in project to assess needs for structured products in the international life and pensions' space and re-positioned the international investment proposition within the Group.

Skandia International (Sep 2009-Dec 2009):

- Prepared business case for 2 projects, feasibility case for a protected product, provide general investments support to the International team.

TECHNICAL AMENDMENTS TEAM LEADER (CONTRACT)

Jan 09 - Jul 09

Selestia (Technical Amendments Team):

- Reviewed processes, specified, tested and implemented change to database breaches and converted it to workflow all correction requests from the company.
- Reviewed price error process and recommended changes.
- Coordinated work with Investment Administration to review end to end processes.
- Reviewed work being done on Final Plan Closures within various parts of division and pulled together coordinated plan to resolve backlog and work more efficiently going forward.

PROFESSIONAL EXPERIENCE AND ACHIEVEMENTS (CONTINUED)

INTERIM MANAGER / CONSULTANT

Jan 08 - Dec 08

Selestia, Client Services Division, (Sep 08 - Dec 08)

- Cleared the client asset reconciliation backlog for all 3 nominees.
- Developed and directed a small team and assisted in investment related matters that ensured all breaks cleared under TCF rules. Mapped processes for team to use on an ongoing basis.

Selestia Investment Services Ltd., Stock and Nominee Cash Reconciliations (Jan 08 – Jan 08)

- Established procedures for BAU and cleared backlogs.
- Moved cash reconciliations and budgets from one area to another.
- Tested and implemented an in-house system for stock reconciliations and “Accurate” for cash reconciliations.
- Set SLAs and costings for services provided by the reconciliations teams to UK Business Units.

ACTING OPERATIONAL CONSULTANT

Dec 06 - Dec 07

Dublin Offshore Life Company: (Solved various start-up and TPA related matters).

MATHS TEACHING ASSISTANT

Jun 06 - Dec 06

Arnewood School, New Milton.

CONTRACTOR

Sep 04 - May 06

Skandia Life Business Services Ltd., Wrap Tools Investment Project (various renewed contracts):

- Produced a strategy paper for the main board on key strategic project of Wrap tools development.
- Developed a risk tolerance questionnaire for IFA Extranet.
- Established caveats / disclosure wording for Financial Express and Citywire for factsheets and web pages. Developed ‘X Ray’ reports, investment tools project, and business documents for a Bespoke OEIC proposition.
- Terminated suppliers and contracts, and established new contracts.
- Coordinated high level issues with Financial Express, Tillinghast Towers Perrin, Citywire, Lipper, Forsyth-OBSR and FTSE.
- Reviewed the international investment administration departments covering Isle of Man, Dublin and Southampton, (all operational matters, inter-departmental dealings, sales force interactions, and committee structures).
- Made recommendations on structure and any changes of practice that optimised the overall performance of the area.
- Establishment formal SLAs between the various companies.
- Moved project through to the feasibility stage: Agreed platform requirements and established the feasibility of delivering this by 1Q2007.
- Sourced 3rd party suppliers that provided rich Wrap functionality that kept Skandia in a market-leading position.

HEAD OF ADMINISTRATION

Aug 03 - Aug 04

James Hay Pension Trustees:

- Made changes and structured and day-to-day practices to enable FSA regulated status.

Early Career Summary: Skandia Life Business Services Ltd. (February 1985 – 2002)

Head of Remuneration & Benefits	2002
Head of Investment Administration	1998-02
Head of MultiFund Project (Southampton)	1997
Head of SICAV Review Project (Luxembourg)	1995-97
Head of Investments (Southampton)	1994-95
Operations Manager	1990-94
Senior Investment Manager	1989-90
Technical Manager	1988-89
Pricing Controller	1985 -88

Transport Controller, Enichem Elastomers (1984-85). Trainee Tax Inspector (1983-84). Management Trainee, Barclays Bank. 1982-83, Mathematics Teacher (1981-82). Short Range Planner, Esso Petroleum (1981-82).

PERSONAL

Interests and Pastimes

Family activities, classical music, swimming, keeping fit.

Other Languages:

Colloquial French and German.

Marital Status:

Married, 2 children.