

# MICHAEL T. KELLY

*Technologist ♦ Strategist ♦ Collaborator*



Mr. Mike Kelly brings 10 years of multiple industry experience ranging from start-ups to established enterprises, applying his technology skills with his business expertise to drive growth, increase revenues, and achieve corporate goals. He excels in identifying the key strategic objectives of a company's operations and leading teams through guidance and collaboration to gain results. He has deep expertise in the financial industry, spanning hedge funds and major financial institutions, implementing technology solutions to improve processes, cut expenses, and support growth initiatives. His career experience has included start-ups, fast-growing firms, global operations, and established companies that are seeking growth and expansion strategies. Identifying and implementing best practices is one of his cornerstone strengths, especially in the technology arena through application of the agile methodology.

Mr. Kelly has a passion for people and is a true servant leader who values innovation and possesses refined leadership teams that enable him to be successful leading large, cross-functional, and geographically diverse teams to success. He values professional development in both himself and his teams and strives to provide a positive growth environment for his team members.

Mr. Kelly's exceptional communication skills facilitate establishing important strategic partnerships and building strong effective relationships up and down the organizational chart and with other external and internal stakeholders. He has the energy to manage technical, complex, and global groups that meet difficult analysis goals and technology implementations.

In his current position, Mr. Kelly is the Founder of Investment Science, a management and technology consulting firm that he founded in 2014. Investment Science serves financial services, private equity, capital markets, and data/credit risk reporting companies, providing project and product management, big data architecture, machine learning, investment management, and technology strategy to align corporate objectives and business transformation initiatives.



His energetic and strategic business development initiatives have landed such major client companies as Israel Discount Bank, an international bank with more than 180 locations, Fitch Solutions, a leading provider of credit, debt market, and macro intelligence data, and CITI, an international investment bank.

At Israel Discount Bank, Mr. Kelly led a team of 70 professionals in software development, business analysis, and project & program management, supporting the Bank's financial operations across 112 branches throughout Israel. He provided business analysis and project management oversight and stemmed critical employee losses, increasing the employee retention rate by 80%. By training and involving employees

in business improvement processes and Agile methodology, he boosted productivity by 60% across the entire scope of operations.

One of his most significant and long-lasting achievements with Israel Discount Bank is that he and his team transformed a stagnant bank culture into an energetic, entrepreneurial “start-up” environment that embraced new technology, valued employee development, and initiative, and sought new ways to grow and expand operations while enhancing all aspects of customer service. His contributions to the bank can only be described as transformative.

With his client Fitch Solutions, he served in an Associate Director capacity for over a year. Fitch Solutions provides credit and macro intelligence solutions through its software portal called Fitch Connect, helping its clients manage their counterparty risk, gain deeper insights into the debt and fixed income markets, and get comprehensive intelligence about the macroeconomic environment. At Fitch Solutions, Mr. Kelly served as the firm’s liaison with banks, hedge funds, private equity firms, and portfolio managers to obtain market insights. He directed a team of 48 professionals organized in four Agile squads to create and deliver an Early Warning Signals software product that creates data cards across news, financials, and accounting to evaluate credit risk. The highly innovative product increased sales force retention by 40% by providing an innovative product they could offer beyond their competitors’ capabilities.

For three years, Mr. Kelly was embedded as a Contractor, Market Surveillance, and Senior Product Manager at Citigroup, a multinational investment bank and financial services corporation headquartered in New York City. The broad scope of his activities at Citi encompassed IT recruitment processes, UX design, and project management. He directed Scrum Master efforts, software development, oversight of data scientists, and was the architect of several new products. He also coached 50 business analysis,

*“Michael is a great project manager and a pleasure to work with. He has been instrumental in leading projects, providing weekly statuses on on-going projects and being a valued consultative advisor on business and technical requirements. On top of his strong technical and business experience, Michael is adept at building and maintaining cohesive relationships with various stakeholder groups. He is a trusted source for Agile, Jira, Confluence and other project management tools and would be an asset to any organization.”*



*It's personal FVP - Israel Discount Bank*



*“Mike possesses the maturity, poise and strategic intelligence of an experienced expert in regards to capital markets, management, consulting, and technology. His diverse background, skilled domain knowledge and pulse on the industry make him invaluable in understanding how to make projects happen, write excellent business requirements, write software code in regards to machine learning, and is able to build cohesive relationships across all departments.”*



*SVP- Citigroup, Inc.*

programming, project management, quality, and machine learning associates, as he negotiated product specifications and drafted timelines. He communicated directly with market surveillance, traders, and compliance professionals to convert legacy waterfall market surveillance requirements into releases, epics, stories, and subtasks.

During his consulting engagement with Citigroup, he saved the company more than \$1 billion per trade violation settlement with the SEC/CFTC by leading Citi’s market surveillance product team to develop a new product – coined “UNO” – that leveraged machine learning to improve the trading moving fix rate from 2% to 98%. He went on to lead a team of 50 IT professional technologists to redesign the product development processes, increasing speed for product delivery by 60% and saving \$3M in reduced time to delivery costs.

Prior to founding Investment Science, Mr. Kelly was a Private Equity Technical Consultant with eFront, the leading technology solution provided for alternative investment management, covering the needs of all alternative investment professionals end-to-end, from fundraising and portfolio construction to investment management and reporting.



While at eFront, he provided business information and leadership for technology strategy, developed web applications for front, middle and back-office private equity business, and constructed reports for business intelligence, and financial modeling, reducing overall risk and increasing new business capture rates. He built financial models for KKR, Blackstone, Deerfield Management, and other private equity firms to forecast and model IRR for real estate and private equity transactions. The financial models and custom configurations he created for private equity projects in less than 6 months generated \$500K in unrealized consulting revenue across the firm's private equity company clients.

In his earlier career, Mr. Kelly was with Citigroup, Inc. (CITI), based in New York. He progressed through positions as a IT Risk Analyst and Alternative Investments & Hedge Fund Technology Associate. He was integral in delivering recurring revenues of \$4M per year by building a bank debt scoring model, which enabled Citigroup's outside clients (Credit Suisse, Morgan Stanley) to assess the overall health of a company to build average credit ratings across all company vendors. He also generated 10% monthly returns for Citi Capital Advisors for event-based spot trading on Spot FX, through Python scripts, systems, and protocols to automatically execute trades based on newly announced economic events. He automated the business information securities department processes / UAT reporting for Citigroup's disaster recovery group, saving the company more than \$400K annually.



Mr. Kelly is currently presently pursuing his MS in Entrepreneurship and Innovation from Indiana University and is scheduled to graduate in 2022. Additionally, he is earning is Stonier Diploma from The Wharton School of Business at The University of Pennsylvania. He earned his undergraduate Bachelor of Business Administration degree in Computer Information Systems, along with an Economics minor from the Bernard Baruch College, one of the ten senior colleges of The City University of New York (CUNY) system, the largest urban public university in the United States, and has additional coursework in finance from Coastal Carolina University in Conway, SC. He is a certified Agile Master, a Scrum Master, and a Scrum Product Owner by SCRUMstudy. Lastly, Michael is a college professor at Baruch College where he teaches a master's level applied data science course in python.

- Scrum Product Owner Certified (SPOC)*
- Scrum Master Certified (SMC)*
- Agile Master Certified (AMC)*
- Numerical Scoring for Investments*
- Technology Management*
- Project and Product Management*
- Agile Scrum Master*
- Capital Markets / Hedge Funds*
- Private Equity / Trade Surveillance*
- Market Data / Algorithmic Trading*
- Python / MongoDB*
- SQL / Apache Spark*
- Kafka / Jira*
- Confluence / Redis*
- MySQL / Neo4J*

Mr. Kelly lives with his family in Long Beach, NY.