

EDWARD PATRON
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Experience

- 2007-Present ROUND TABLE INVESTMENT MANAGEMENT Charlotte, NC
Chief Technology Officer
Responsible for all technology infrastructure, application development, operations, engineering and facilities resources supporting the formation and launch of a global, multi-strategy hedge fund.
- Advise partnership on staffing, resources, operations best practices, expense management and planning.
 - Implemented and integrated vendor and proprietary Front, Middle and Back Office applications allowing for real time risk analytics, profit/loss measurement, and straight-through processing of trades.
 - Designed and implemented a proprietary collateral management system used for margin and liquidity management, creditor reconciliation, and margin requirement validation.
 - Designed and implemented all network and communications services, operations and trading work flows, including contingency data center and plan, in less than four months.
 - Engineered and oversaw the facilities and infrastructure build of the flagship office. Ensured project completion five weeks ahead of schedule.
 - Recruited a team prior to launch through networking and referrals.
- 2004-2007 CHARLES SCHWAB & CO., INC. San Francisco, CA
Vice President – Charles Schwab Investment Management
Chief Technology Officer & Head of Investment Operations
Responsible for over 50 technology infrastructure, application development and operations personnel supporting \$240 billion in mutual fund and separately managed account assets.
- Implemented a Credit Exposure & Trading platform for \$140 billion in Money Fund assets.
 - Redesigned the investment process for \$17 billion in ultra-short duration Bond Fund assets.
 - Restructured the Custody and Treasury functions resulting in a \$70+ million benefit to shareholders.
 - Implemented a .NET and Service Oriented Architecture that allows for rapid integration of third party applications, persistent data availability, and straight-through processing.
 - Implemented and integrated Charles River's Compliance and Trading software across the fund complex.
- 2003-2004 STANDARD PACIFIC CAPITAL San Francisco, CA
Director of Information Technology
Responsible for all technology infrastructure and operations including: network and desktop administration, full-time and contracted personnel, service providers, market data services, software evaluation and implementation, phone systems and providers, hardware evaluation and acquisition, user support and application development.
- Managed the relocation, redesign, upgrade and rebuild of all network and communications services, hardware, software, and infrastructure from 425 to 101 California Street.
 - Managed the migration from an internal accounting platform to an external fund administrator and solution.
 - Implemented same day bond pricing and local currency reporting for portfolio appraisal and evaluation.
- 2000-2003 J.P. MORGAN SECURITIES, INC. San Francisco, CA / New York, NY
Vice President – U.S. Equities
Managed all technology operations, applications and infrastructure for the Research Department. Recommended business process redesign and made technology decisions on behalf of the department. Defined requirements and evaluated options for application development and acquisition.
- Consolidated all legacy H&Q, Chase and J.P. Morgan Research systems and operations.
 - Oversaw dedicated operations personnel and application specialists across all North American locations.
 - Reduced annual operating expenses (excluding compensation) in U.S. Equity Research and Sales by 13%.
- 1999-2000 MASSACHUSETTS FINANCIAL SERVICES Boston, MA
Project Manager/Senior Business Systems Analyst – Investment Operations
Maintained and developed information systems for MFS' investment management teams. Designed and built software applications and databases consistent with user requirements.
- Designed, developed, and tested a currency derivatives trading application for Fixed Income Trading.
 - Produced a general ledger datamart to support a dividend tax equalization initiative for Fund Treasury.

1996-1999 FIDELITY INVESTMENTS Boston, MA
Senior Business Analyst – Asset Services Division
Acted as a liaison between the end users and the developers for modifications to Fidelity Investments' proprietary software applications.

- Documented business requirements, system design specifications, and user acceptance test plans.

Education

1991-1995 MASSACHUSETTS INSTITUTE OF TECHNOLOGY Cambridge, MA
Bachelor of Science in Engineering, 1995