

# Carolyn Simi – Career CV

## **OBJECTIVE**

To provide Project Management and Business Documentation services to small and medium sized businesses for internal software implementation requirements and SOP creation/updating.

## **PROFESSIONAL PROFILE**

**Your Project Planner**, Seattle WA

July 2016 to Present

Providing Project Management and Business Documentation services to small and medium sized businesses who can't justify having those resources on staff.

- Project Planning – implementing new programs, products or services according to the client's specifications
- Business Documentation – helping clients create a consistently reliable environment for their staff and being well prepared to scale their business.
- Accountability Coaching – helping clients accomplish the goals they have been avoiding for too long.
- Please see [www.yourprojectplanner.com](http://www.yourprojectplanner.com)

**Certified Professional Coach**, Seattle WA

September 2013 to Present

Supporting clients through the process of creating the career transformation they're looking to achieve. Providing Accountability Coaching and Thought Partnership to clarify goals, clarify a new path and create a plan to make it happen.

Please see [www.createyourencore.com](http://www.createyourencore.com)

## **The Simi Group:**

Client: Ridge Clearing and Outsourcing, Jersey City NJ January 2012 to December 2014

Responsibilities: Managed multiple projects, converting the back-office functions of institutional Investment companies to Ridge Clearing and Outsourcing services.

Client: Société Générale, Jersey City, NJ

June 2010 to August 2011

Responsibilities: Provided project support on a 3-person Testing Management team to convert the Fixed Income & Equity business to the Broadridge system

Client: Broadridge, Jersey City, NJ

Nov. 2009 to June 2010

Responsibilities: Provided PMO oversight responsibilities for the Separation of Assets portion of the Penson/Broadridge Project.

Client: HSH Nordbank, New York, NY

April 2008 to February 2009

Responsibilities: Managed the implementation of the NuView Human Resources system for the New York office.

Client: Washington Mutual, Seattle Washington April 2007 to March 2008  
Responsibilities: Managed enhancements to the LMS (Loan Management System) for the Conduit Lending Desk (modules: Repurchase, Quality Control, Loan Talk).

Client: Hypo International Real Estate, New York, NY May 2006 to March 2007  
Responsibilities: Managed the installation of the Pipeline, Underwriting, and Asset Management system to the Backshop software package.

Client: Washington Mutual, Seattle, Washington Feb 2005 to April 2006  
Responsibilities: Project managed the installation of Bloomberg as a front end to Summit for Futures and Options on Futures.

Client: JP Morgan Chase, New York, NY Sep. 2004 to Feb. 2005  
Responsibilities: Developed the structure for tracking and reporting on merger related technology testing for the Treasury Services project groups (JPMC/Bank One).

Client: UBS Paine Webber, Weehawken, NJ Jan. 2004 to Aug. 2004  
Responsibilities: Managed the deliverables process for 48 applications involved in the unit-testing phase of the securities processing integration UBS, Paine Webber and S. G. Warburg.

Client: E\*Trade Financial, New York, NY Jan. 2003 to June 2003  
Responsibilities: Analyzed the screen level functionality of a custom developed Institutional Trading system, documented process flows, documented the system.

Client: HypoVereinsbank, New York, NY Feb. 1999 to Dec. 2002  
Responsibilities: Managed multiple projects for several different departments – Human Resources, Money Market desk, FX desk, U.S. Equities Trading desk, Options desk.

**EDUCATION:** BABS, Redlands University, California

## **CONTACT INFORMATION**

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