



# Alan J.

Business professional with extensive experience in both the Financial Services and Utility industries. Skill in seeing issues at a strategic, qualitative level with ability to deliver at tactical and operational levels. Excellent analytical, quantitative, communication and interpersonal skills

## Expertise

- **Project Management:** Created new business opportunities by heading project teams that installed new major software applications. Certified Project Management Professional (PMP) credential.
- **Product Management:** Established new business line by writing business cases for funding new products, product plans for existing products, and marketing plans for new business ventures.
- **Financial Management:** Streamlined annual financial planning cycle by implementing “bottom up” collaborative process with business unit managers for budgets and business forecasts.
- **Cash/Treasury Management:** Led the sales and marketing, product management and development, customer service, operations support, and financial performance of the bank’s Cash /Treasury Management and Electronic Banking services. Certified Cash Manager (CCM) credential.

## About Alan

Alan is now retired after nearly 40 years of progressive marketing, project management, product development and financial management positions in the Financial Services and Electrical Utility industries

Alan has worked in the corporate world but has been an “intrapreneur” and has learned how to plan, launch and develop new businesses. His Strengths Finder five signature themes are: Strategic, Analytical, Maximizer, Learner, and Responsibility .

Alan has been active in at Lake Avenue Church (Pasadena, California) serving on the Finance and Administration ministry team as well as the leadership teams for Marriage Ministry and Prayer Ministry, and Business as Mission . He has been active in Bible Study Fellowship and is currently a Group Discussion Leader.

## Experience

IBEC Ventures	Pro-Bono Consultant	2016 – present
Taproot Foundation	Pro-Bono Project Manager/Consultant	2014 – 2015
Union Bank/Mitsubishi Bank	Project Manager: Operations Integration	2013– 2014
Southern California Edison.	Senior Financial Analyst & Project Manager	2005 – 2013
Citibank West	Manager – Financial Administration	1999 – 2005
Glendale Federal Bank	Product Manager and Interim Director of Cash Management	1998 – 1999
City National Bank	Senior Product Manager: Direct Banking	1996 – 1997
Mitsui Manufacturers Bank	Vice President & Manager: Cash Management and Electronic Banking	1985 – 1996 –
First Interstate Bank California	Senior Product Manager – Corporate EFT	1980 – 1985

## Certifications

Project Management Institute (PMI)	Project Management Professional (PMP) since 2011
Association For Financial Professionals (AFP)	Certified Cash Manager (CCM)

## Education

University of Southern California	MBA, Marketing Management; Finance (minor)
University of Southern California	BS, Marketing Management