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| **Title / Location** | **Skill Set / Details** |
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| **Senior Consultant, Capital Markets**  **Location: New York or Northern Virginia** | We are currently seeking talented professionals to join our firm as a Senior Consultant. The ideal candidate will have (i) proven track record of success with a minimum of three (3) years of financial services experience (ii) strong product knowledge across fixed income and derivative asset classes (iii) understanding of structured finance and (iv) prior consulting exposure.  Required Skills:  • Minimum of 3 years of Capital Markets experience, including a minimum of 1-2 years of strong quantitative analysis experience, related to fixed income and derivative instruments.  • Understanding of Fixed Income instruments and Derivatives; with detailed understanding of risk, pricing and operations  • Experience implementing complex financial concepts across front to back office  • Hands on experience with third party derivative applications (i.e. Calypso, Murex, OpenLink, Sophis, Summit)  • Participated in the redesign of large multifaceted fixed income and derivative processes  • Experience performing detailed requirements, future state process flow, testing and reporting analysis  • Detailed working knowledge of MS Office, particularly Excel and VBA; experience with SAS is a plus (Ability to run queries and conduct data manipulations)  Desired Experience and Qualifications:  • Knowledge of accounting standards FAS 91, FAS 115, FAS 133 and FAS 157  • Product controls experience a plus  • Strong Analytical and Problem Solving Skills  • Strong Oral and Written Communication Skills  EDUCATION  BS in Finance or Accounting or MBA in same concentration;  Bachelor Degree or equivalent in mathematics, engineering, computer science, or financial quantitative research  CPA and/or CFA designation is preferred.  Please forward all resumes to [tsantoro@actualizeconsulting.com](mailto:tsantoro@actualizeconsulting.com) |
| **Senior Consultant, Capital Markets**  **Location: New York or Northern Virginia** | At this time we are looking for candidates to join the firm at the Senior Consultant level in our NYC or Northern VA offices who have the following skill sets:  **Required Skills:**   * 3 to 5 years of consulting experience in the corporate treasury or financial services; including * Risk Management * Liquidity Management * Accounting   + Exposure and knowledge of financial instruments including * Derivatives - commodity, credit, equity, foreign exchange and interest rate * Funding - credit facilities, corporate debt and intercompany loans * Investments - ABS, MBS, corporate bonds, municipal securities and money market instruments * Process/Project Management skills * Strong interpersonal skills * Ability to manage multiple tasks * Client service oriented   **Desired Skills:**   * + Experience across Corporate Treasury functions including * Cash management * Cash forecasting * Payments   + Treasury system implementations   **Desired Technical Skills:**   * Advanced Access / Excel functions * SQL * VBA   Please forward all resumes to [tsantoro@actualizeconsulting.com](mailto:tsantoro@actualizeconsulting.com) |
| **Accounting Analyst / Derivatives Accounting, Capital Markets**  **Location: New York** | Candidate should have 5-7 years’ experience.  **Role:**   * Analyst will support the team in preparing reports in support of the client’s quarterly SEC reporting activity. * Assist on projects to identify opportunities to drive efficiency & strengthen controls in derivatives & hedging processes * Disclosures and financial derivative reporting   **Required:**   * Strong analytical and strategic thinking skills * Excellent communication and presentation skills * Capable of managing multiple projects concurrently * Strong organizational skills and attention to detail * Strong in Excel and PowerPoint * Strong hands on experience with Access   **Desired:**   * Familiar with Basel requirements * Audit experience a plus   **EDUCATION:**  Undergraduate degree in Accounting or Business  Please send qualified resumes to tsantoro@actualizeconsulting.com |
| **Capital Markets Manager**  **Location: New York** | Actualize Consulting is looking for a Senior Manager to play a key role in the growth and development of the Capital Markets practice based in New York City. The manager will be largely responsible for strategy, growth, and client delivery for the firm’s growing Capital Markets practice. The ideal candidate will have professional services/consulting experience, broad capital markets, asset management, solid systems technologies knowledge, and credible experience with large scale business transformation, M&A projects and a proven track record for leading consulting engagements and growing a practice.  REQUIRED SKILLS:   * Strong Capital Markets, Trading and/or Financial experience with solid knowledge of Fixed Income and Derivative instruments * Consulting or Professional Services experience strongly preferred * Ability to lead and approach the market from a platform of individual credibility, based on established client relationships and thought leadership around key issues facing the asset managers, asset servicers, and prime brokers * Leading client proposal efforts including defining the proposed solution, framing the approach, scoping the work effort, and participating in both qualifying and closing new business opportunities. * Assist with overall growth strategies for the NY office, including the financial management planning and analysis. * Manage existing client relationships, strategic planning, lead sales efforts and firm expansion * Ability to leverage business contacts and drive revenue * Lead strategy and overall management of relationship and opportunity pursuit at primary clients * Participate in industry meetings and conferences to elicit information about issues and opportunities facing financial services entities, including companies operating in the banking, finance, insurance, securities, investment management, and real estate. * Superlative written and oral communication skills with background in creating and writing proposals * Ability to mentor and develop junior staff   EXPERIENCE AND QUALIFICATIONS:   * 10-15 years’ experience in Capital Markets environment * 4-7 years proven experience in capital markets product analysis, workflow & process analysis, cost analysis and derivatives system implementation * Deep and broad industry knowledge of various markets, competitors, technologies, future trends, and service offerings * Prior project management experience in financial services or securities required, preferably in capital markets * Ability to manage multiple efforts simultaneously across a wide spectrum of initiatives * Ability to define executive presentations and tailor the messaging to the appropriate audience (CFO, COO, CIO, Head of Operations or Head of Distribution) * Strong business analysis and re-engineering skills with a specialization in middle and back office operations/technology – including operating models * Good contacts with executives in asset manager, asset servicing and prime brokerage companies and be adept at marketing and selling management consulting services at the most senior levels in client organizations. * Ability to think strategically and to assist in the organization and management of a multi-disciplinary team and the ability to cross-sell additional services to clients * Experience with vendor selection and technology implementations * A proven record in leading high profile client engagements with strong client satisfaction on-time, within budget * Strong Business Development background * Experience in relationship building that increases account penetration and leads to increased revenue opportunities with existing clients   EDUCATION  An appropriate BA or BS degree is required; an advanced degree such as an MBA from a top tier program or CFA and/or CPA is preferred.  Please send qualified resumes to tsantoro@actualizeconsulting.com |
| **Accounting Manager, Capital Markets or Mortgage and Fixed Income practice areas**  **Location: New York or Northern Virginia** | Financial services accounting manager with Capital Markets and Mortgage and Fixed Income background. CPA required and CFA a plus.   * Expertise in accounting with a mix of the following areas: fixed income and derivative products, including hedge accounting, securitizations, mortgages, and loans. Consulting experience is strongly preferred and must be able to lead engagements.   Please send qualified resumes to tsantoro@actualizeconsulting.com |
| **Senior Technical Lead**  **Location: Northern Virginia** | We are currently seeking a talented professional to join our firm as a Senior Technical Lead in the IT practice area of the firm. The ideal candidate will have prior consulting experience; and the ability to perform high quality service on client engagements. The candidate will report to the director of technology.  REQUIRED SKILLS   * Ability to lead strategic efforts including architecture and roadmap, design, and IT controls * Provide architectural/design expertise regarding IT projects * Responsible for understanding and developing data and system interfaces for complex financial software. * Proficient in developing multi-tier IT solutions. * Strategic Software Product Development * Knowledge Management and Business Information Integration. * Provide alignment of IT strategy and planning with company's business goals. * Work with development teams to engineer enterprise solutions that are scalable, adaptable and in synchronization with ever changing business needs. * Experienced in multiple project methodologies including Agile SCRUM, Waterfall and Iterative Development. * Knowledge of industry leading and emerging software products in the financial services industry   TECHNICAL EXPOSURE   * Architecture * IT Controls * SDLC Methodologies * Workflow * RDB Concepts * BI/Reporting Concepts * Project Management   EXPERIENCE AND QUALIFICATIONS   * BS in Computer Science or IT related discipline * Leadership experience * 5-7 years in the finance industry * 5+ years’ experience in project or process change work, preferably in a consulting environment * Strong Analytical and Problem Solving Skills * Strong Oral and Written Communication Skill * 5+ years’ experience working in the financial services industry supporting front, middle, or back office functions.   Please send qualified resumes to tsantoro@actualizeconsulting.com |
| **Business/Data Analyst – Mortgage Data / MISMO Standards**  **Location: Northern Virginia** | We are currently seeking talented professionals to join our firm as Business Analysts / Data Analysts in the Mortgage and Fixed Income practice area. The ideal candidate will have prior consulting experience; and the ability to perform high quality service on client engagements.  REQUIRED SKILLS   * Strong product knowledge of mortgage lifecycle – from origination through securitization. * Expertise in supporting credit policy rule and documentation development for the Business Rules Service and MISMO for Loan Delivery. * Ability to rationalize data into a set of current state data list, and then map to either to an Enterprise Logical Model), MISMO and to the client data standards * Ability to support SIT and UAT testing of the repository and define data specifications. * Experience conducting mortgage dataset analysis, mapping all current data elements received by our clients into a consolidated inventory of data that will be the baseline for future analysis. * Experience in the creation of the business case; business requirements; architecture documents; and other supporting documents as required.   EXPERIENCE AND QUALIFICATIONS   * BS in business or technology related discipline * 3-5 years in the mortgage industry * 2-3 years’ experience in project or process change work, preferably in a consulting capacity * Strong Analytical and Problem Solving Skills * Strong Oral and Written Communication Skills * Knowledge of MISMO / UMDP a plus   Please send qualified resumes to tsantoro@actualizeconsulting.com |
| **Senior Consultant / Manager/Senior Manager**  **Location: Northern Virginia** | **Position Highlights:**   * Business expert possessing credit risk, loan origination and operational expertise to meet the dynamic and challenging requirements of the mortgage banking industry. * Strategic analysis and re-engineering * business analysis * business process design and redesign * process documentation * issue identification and resolution * regulatory compliance preparation * Experience managing the implementation of strategic, product, and process projects for large banks * Stakeholder Analysis, Project Charters, Project Management Plans, Operational Impact Analyses, Needs Assessments, Market Analysis, Current State/Future State Flows, GAP Analysis, Product Roadmap, Cost/Benefit Analysis, Business Requirements, and Senior Management Presentations.   **Required Knowledge and Skills:**   * Subject matter expert in single-family mortgage credit, capacity and collateral related policies. * Strong background in one or more of the following business domain areas: loan origination, underwriting, secondary marketing, operations management. Contribute strategic and operationally sound solutions to assist organizations in navigating through industry and regulatory obstacles realized in underwriting and development of policy and procedures. * Ability to create and update change management process documents * Understand and document current processes/procedures, develop process flows, consolidate disparate processes into a single unified change management process and identify areas where the process can be improved. * Must be able to interact with a technical team * Experience streamlining processes by means of Business Process Re-Engineering * Experience in operations, asset sales, or compliance * Experience designing future state process and procedures as well as documenting them * Reviews existing policies and procedures to ensure their appropriateness and adequacy. Ensures that documentation criteria are in accordance with internal standards as well as external regulatory and legal requirements.   **Desired Experience and Qualifications:**   * BS in business related discipline * 5-10 years in the financial services industry * 3-7 years’ experience in project or process change work * 3-7 years’ experience leading efforts * Strong Analytical and Problem Solving Skills and Oral / Written Communication Skills * Works under limited direction.  Independently determines and develops approach to solutions. * Ability to interact with senior business partner personnel on significant technical matters frequently requiring coordination across organizational lines.   Please forward all resumes to [tsantoro@actualizeconsulting.com](mailto:tsantoro@actualizeconsulting.com) . Thank you. |