JEFF MARX, CFA
███████████ | Austin, TX | ████████

Summary: Exceptional management skills in the areas of structured financial modeling and data analytics. Visionary who implements new products and processes to drive business objectives. Successfully launched a global team of 23 contributors who broadly support the structured finance businesses. Adept at collaborating across functions and integrating technology improvements. In depth understanding of the structured finance markets. Keen focus on scalability, process and governance.

PROFESSIONAL EXPERIENCE

DBRS MORNINGSTAR, New York, NY (remote)
Head of Cash Flow Analytics, Credit Ratings   Oct 2011 – Present
Oversight of cash flow analytics for 400+ Structured Finance new-issue and 300+ surveillance transactions / year

- Manage 23 cash flow engineers across New York, Stamford, Chicago, London, Frankfurt and Mumbai.
  - Team provides modeled rating-level cash flow outputs across US ABS, US RMBS and US CLOs, and EU SF.
- Expert in applying Intex software:
  - Led development of Intex Runner, a Python app customized to apply the nuances of global methodologies.
  - Enhanced ability to run portfolio-level cash flows using IntexCalc, improving the global surveillance process.
- Developed data products that provide automated surveillance outputs in Tableau.
- Exceptional ability to work across the organization to achieve strategic objectives, with a focus on technology.
- Successfully implemented the CFA Mumbai team (8 contributors), with a focus on software development.
- Implemented the cash flow analytics procedures that are used globally across Structured Finance. The process instructs independent transaction analysis, robust controls and a strict adherence to model governance.
- Lead efforts to provide global training of cash flow approach, technology and process.
- Skilled at properly managing a global supply chain of geographically distributed talent.

GOLDMAN SACHS, Jersey City, NJ
Associate, Asset Management Pricing   May 2009 –Oct 2011
Provided pricing oversight of US RMBS, CMBS & CLO portfolios:
- Security Evaluation – Hand-priced $8 billion portfolio of US Non-Agency RMBS in Intex.
- Market color – Performed relative value analysis by monitoring trade color and dealers' BWICs.
- Deal specifics – Specialized in the review of servicer behavior and loan modifications.
- Platforms – Bloomberg and IntexDesktop (Developed an Intex loan-level transition model).
- Led the development of a SQL database that analyzed data related to collateral performance and market color.

DELOITTE & TOUCHE, New York, NY / Honolulu, HI
Senior Consultant   Sept 2004 – May 2009
- Developed a third-party opinion on the sale price of MBS securities included in the $39 billion transfer from UBS to the Swiss National Bank.
- Cash flow modeling – Implemented a scripting-based software to reverse engineer MBS transactions.
- Collateral Analysis – Coordinated with investment banking clients to perform statistical analysis on the underlying assets using the Collateral Analysis System (CAS).

VOLUNTEER EXPERIENCE

ROLLINGWOOD COMPREHENSIVE REVIEW COMMITTEE, Rollingwood, TX   April 2023 -October 2024
- Selected to a 7-person committee to help rewrite the residential code, based on resident input.
- Applied research, modeling, data analytics, and project management skills to help the committee solicit resident input and potentially rewrite the code.
- [Leveraged ChatGPT](#) to turbocharge our data analysis efforts.

EDUCATION & SKILLS

BOSTON UNIVERSITY B.S. Business Administration (Summa Cum Laude, top 5% of class)   May 2004
CERTIFICATIONS: Chartered Finance Analyst, Certified Public Accountant (New Jersey, Inactive)
SKILLS : Intex Dealmaker, IntexCalc, Python, Tableau, AWS Athena, Jira