

Submission information

Form: [Rollingwood Community Development Corporation \(RCDC\) Application](#) [1]

Submitted by Visitor (not verified)

Thu, 11/27/2025 - 6:01am

162.159.106.48

Full Name

Jeff Marx

Phone Number

[REDACTED]

E-mail

[REDACTED]

Home Address

[REDACTED]

Employment

Occupation

Finance

Employer

Morningstar

Business Address

22 W. Washington Street, Chicago, IL 60602

Qualifications

Are you a United States Citizen?

Yes

Are you eighteen (18) years of age or older?

Yes

Are you a registered voter of the City?

Yes

How long have you been a resident of Rollingwood?

I've owned in Rollingwood for 6 years. Lived here for 4 years.

Have you resided continuously in the state for twelve (12) months immediately preceding today's date?

Yes

Have you resided continuously in the City of Rollingwood for six (6) months immediately preceding today's date?

Yes

Have you been determined by a final judgment of a court exercising probate jurisdiction to be: (A) totally mentally incapacitated; or (B) partially mentally incapacitated without the right to vote?

No

Have you been finally convicted of a felony from which you have not been pardoned or otherwise released from the resulting disabilities?

no

Experience

Please give a brief resume, including education, past employment, any special background or qualifications you have for service on the Rollingwood Community Development Corporation. Use attachments if necessary.

I was selected as a founding member of the CRCRC, which was a 7-person committee that helped rewrite the residential code, based on resident input. Through that experience, I applied research, modeling, data analytics, and project management skills to help the committee solicit resident input and rewrite the code.

Upload Resume (Optional)

[jeff_marx_resume_11.27.25.pdf](#) [2]

Have you previously served on a Board or Commission?

Yes

If yes, which board or commission and how long?

CRCRC from April 2023 to October 2024

Please state why you wish to serve the Rollingwood Community Development Corporation?

I have a strong view that Rollingwood needs the best effort it can get from volunteers in order to thrive and reach its potential. I have skill that can be used effectively in a formal role with the City. I am a good listener and start the process by gathering community input. I have strong organizational skill and have successfully implemented complex projects through my work experience. I have good data and technology skills, which can be useful when trying to build solutions with a limited budget. I am a self starter who will put in the hard work when I find purpose in a project.

Source URL:<https://www.rollingwoodtx.gov/node/9504/submission/5465>

Links

[1] <https://www.rollingwoodtx.gov/bc/webform/rollingwood-community-development-corporation-rcdc-application> [2]

https://www.rollingwoodtx.gov/system/files/webform/jeff_marx_resume_11.27.25.pdf

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