

Kevin Montagne

Technology Consultant

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Summary

Creating a Market Advantage by Solution Development & Architecture Design Innovation

- # Financial Services & Trading Platforms
 - # Enterprise Architecture & IT Infrastructure Design
 - # Open Platform Product & Solution Development
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20+ years of progressive technology leadership roles defining the forefront of new and emerging technologies in the Trading and Financial Services industry.

Developed and delivered solutions that were game-changers at many of the leading equities and commodities trading institutions – including Fidelity, Enron, UBS, and JPMorgan Chase. Also served in C-level roles with a start-up provider of real-time monitoring and business analytics solutions for specialized energy drilling operations and as a CTO/Executive Consultant for an array of leading companies.

A “glue guy” that bonds diverse resources into a cohesive team and a visionary leader that breaks down paradigms and drives transformation across the technology group and the entire organization.

VISIONARY LEADERSHIP

- # Define and articulate a clear business vision fully aligned with the strategic technology roadmap
- # Assemble top-notch talent and empower them to pursue creative solutions within a focused operational framework
- # Drive inspiration by assigning resources to initiatives based on their individual strengths and motivations
- # Foster an environment of transparent communications and a commitment to ongoing training and development

QUALIFICATIONS

MBA Degree from Southern Methodist University (SMU)

BS in Computer Science from Lamar University

Thought leader, published in Communications of the ACM

Experience

President | Principal Technology Consultant at Litkam, Inc

January 2009 - Present

Engagement Management & Program Management

Enterprise Technology Strategy & Goal Alignment

Solution Design & System Optimization

Through both Litkam and another consulting company (Aeysis), engaged with a variety of confidential clients and market leaders in the energy, financial services, technology and computer hardware, staffing and recruiting, and entertainment services sectors.

SELECT ENGAGEMENTS

Bank of America (2015 - Current)

Aligning the product strategy for an in-house developed grid product with the needs across the capital markets lines of businesses. The grid software provides access to 225K+ compute cores for financial risk calculations and reporting.

---Focusing on optimizing the infrastructure investment, increasing performance and expanding the instrumentation available to development teams.

Retail & Commercial Energy Provider

Drove alignment of technical direction within the organization and across a portfolio of vendors to guide the technology architecture design and execution.

---Facilitated seamless data center closure, consolidation, and build out programs.

---Enabled the transition from EMC to a Hitachi SAN for 1 Petabyte of data across more than 1,000 servers.

---Championed VDI cluster performance optimization and stability solutions.

Tier 1 International Financial Institution

Facilitated a significant improvement in the throughput of risk calculations for exotic financial instruments.

Dell

Performed an in-depth marketing analysis of Dell technologies to help improve their data center systems market share.

Legal

Provided expert analysis and co-authored opinion paper for multi-billion dollar federal lawsuit concerning offshore oil production control and safety systems.

Chief Technology Officer (CTO), Commodities | Executive Director, FICC Architecture at UBS Investment Bank

2004 - 2008 (5 years)

Recruited back to UBS when they needed a senior leader to re-open the Houston office. After identifying market opportunities, also facilitated the opening of the Austin branch. Between the two locations and working with global teams, managed the architecture design and coordinated the product development for Fixed Income Credit and Currency and Commodities Brokerage and Trading.

PRODUCT DEVELOPMENT & ENTERPRISE ARCHITECTURE

Automated proprietary trading and client flow trading through major exchanges (NYMEX, ICE, CME) by developing a product-agnostic platform.

---Created a solution that was scalable and repeatable, quickly picked up by the base metals trading group.

---Drove significant increases in trading volumes.

---Achieved massive reductions in order execution time-to-market.

Designed the system architecture, including the database and OS design, for a system managing credit default swaps and other credit derivatives.

ORGANIZATIONAL LEADERSHIP

Served as a member of the Technology Council to evaluate and recommend strategic investments and define the enterprise technology road map.

Evaluated the global use and effectiveness of database and reporting solutions.

---Created an enterprise standard to solve the problem of various groups acquiring their own solutions, resulting in more than 750 products across the globe.

---Reduced the number of strategic database and reporting technologies down to 65.

---Cut significant licensing costs through standardization.

Vice President & Lead IT Architect, North American Equities Trading at JPMorgan Chase

2003 - 2004 (2 years)

Brought in as a member of the Site Leadership Team to direct a team of 75 in IT development operations for the Houston Equity Group. As part of this program, also responsible for solution Architecture for equities trading operations throughout North America.

BUSINESS LEADERSHIP

Led the recruiting, training, and development of the technical professionals for this fast-growing organization.

---Revamped the entire candidate recruitment process to enable the business to attract and on-board top-notch talent and contribute to the rapid scale-up of this organization. More than 300 employees were added in 12 months.

Planned and managed a multi-million-dollar IT staffing budget.

IT Director, Commodities | Lead Systems Architect

1998 - 2003 (6 years)

At Enron, coordinated teams in the design and delivery of the solution architecture for proprietary trading systems. Also led product development and product management projects.

When UBS Warburg acquired Enron, transitioned into a role as the Commodities IT Director and Lead Systems Architect. During the acquisition, provided due diligence to streamline the integration of hardware and software assets and solutions. Also represented the Head of FICC IT and co-CIO of the investment bank in advising the global business areas on internal IT initiatives.

PRODUCT INNOVATION

Served as a Founding Member and Architect of the award-winning EnronOnline proprietary trading system.

---Revolutionized the commodities trading industry via price transparency and firm bids/offers.

---Vaulted Enron to a dominant #1 position in North American natural gas and power trading, with \$6B in trading volume and more than 250 million requests daily representing 70% of the entire market.

---Created a highly scalable, high-availability infrastructure.

---Spearheaded critical advancements in network design, load balancing, and server optimization.

Led the Architecture Team at UBS to drive the integration of Enron's solution infrastructure and application stack into UBS.

---Resolved key regulatory and corporate policy matters.

---Spearheaded the system capacity expansion by 3-fold.

---Led the Web-enablement of price discovery and order management to boost trader productivity from 100 trades per day to more than 2,500 trades per day.

Solution Architect | Team Lead | Developer at Fidelity Investments

1987 - 1998 (12 years)

Over an 11-year span, interspersed with a 2-year stint at Recognition Equipment (REI), served in roles of progressive accountability at Fidelity. The hallmark of the time there was leading the design of a next-generation platform architecture that served as the foundation for all future retail customer service and sales applications at Fidelity.

BUSINESS IMPACT

- # Improved data processing time from more than 1 minute down to 8 seconds, and then further reduced it to less than 2 seconds.
- # Expanded the platform to be used by 5,000 licensed representatives, from just 50.
- # Developed the solution to enable reps to have a unified view of all customer financial data, which previously required the rep to access multiple mainframe systems manually to put it all together.
- # Helped design and develop a prototype of a rules-based engine to manage open system operations.

Education

Southern Methodist University

Master of Business Administration (M.B.A.), Business, 1988 - 1991

Lamar University

Graduate Studies, Computer Science

Lamar University

BS, Computer Science

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