

Brian Osmond

Team Lead Supervisor

Brian Osmond

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Skills

Critical Thinking

Innovative; Collaborative; Analytical

Project Management

Client Relations

Financial Regulations

Ambitiously driven individual recognized professionally for exceptional work ethic and attention to detail. Self-starter requiring little direction to produce quality outputs. Extensive background in fixed income securities and money market funds coupled with wide-ranging analytical and managerial skills. Five consecutive years exceeding expectations while rising to meet any occasion professionally relying on exceptional verbal and written communication skills. Six years Mutual Fund Transfer Agency experience preceded by three years of Fixed-Income reporting and analytics experience.

Experience

Bank of New York Mellon - Team Lead Supervisor, Offshore Transfer Agency

October 2015 - Present, Syracuse, NY

Managed timely and accurate trading activity for European domiciled Money Market Funds.

- Supervised high volume trade processing, averaging over 1,000 manual and electronic daily trades while meeting strict trade deadlines
- Facilitated the movement of large financial transactions across all major currencies, averaging over 500 million USD equivalent weekly
- Increased departmental efficiencies 50% over five years while reducing trade processing errors from an average of 10% to zero month over month
- Steered collaboration with European-based colleagues supporting the Follow The Sun business model

Balance Sheet Management Services - Fixed Income Accountant

June 2013 -March 2015, Hauppauge, NY

Spearheaded launch of the fixed-income and investment accounting division to promote client relations, client financial capabilities and strengthen the overall trading potential of the firm.

- Liaised directly with heads of banks and credit unions to ensure appropriate accounting and understanding of fixed-income portfolios
- Developed general, custom and ad-hoc investment reports to serve variety of client based needs
- Pioneered departmental growth to attain and retain lucrative clients through array of services and innovative reporting techniques
- Personally oversaw largest clients including Credit Union with total fixed-income holdings at USD One Billion

First Empire Securities - Portfolio Analyst

October 2012 - June 2013, Hauppauge, NY

Analyzed client financial holdings to expose key investment risk factors and highlight asset performance to optimize expected cash flows.

- Scrutinized potential discrepancies while reconciling large cash flow fluctuations
- Collaborated with clients and brokers directly regarding financial positions, cash flow projections and realized gains to support optimal trading decisions
- Utilized industry leading analytical software and Bloomberg research ensuring accurate future projections and past asset performance

Education

State University of New York, College at Oswego

May 2012, Oswego, NY

Bachelor's Degree, Economics

Political Science Minor

New York State Assembly Intern, District 120

2011 – 2012, Fulton, NY

- Constituent Liaison
- Speech / Press Release Writing
- Scheduling
- Office Management

Awards

Dean's List 2009, 2010, 2011

Oswego State Class of 2012 Commencement Speaker

Oswego State Scholarship Awards Committee

Oswego State Future Alumni Association Chair