

**Joseph Rosenholtz**

**Associate Advisor**

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Joseph Rosenholtz is a senior executive with twenty years of experience specializing in strategy definition, process and risk mitigation for corporate IT. He has a broad background in both technology development and management.

For Alden Global Capital, a hedge fund with approximately \$3B in assets under management, Joe reviewed multiple options for a new CRM system that would simplify investor relations, marketing and reporting. Though Alden is relatively small, the Investor Relations Department, staffed by a handful of professionals, needed to automate their work. Among the alternatives considered were vendor based systems hosted locally or as a service and developing a new in-house proprietary system. Joe successfully negotiated and implemented the Netage Dynamo CRM system. The system was hosted locally and included mobile access via Blackberry or iPhone. Key issues identified and managed during the implementation were accuracy and reliability of the data in the new system, security and training.

As CIO (consulting) for Citibank's multi-strategy hedge fund he reengineered a technology department of more than 80 professionals on three continents, slashing nearly 40% of a 25m budget within two years, dramatically reducing operational risk and improving systems uptime and reliability. He introduced change management, issue tracking and development best practices that nearly eliminated operational breaks and vastly improved front middle and back office systems integration by creating a state of the art SOA architecture.

Working as the North American representative for Matrix, one of Israel's largest technology outsourcing companies, Joe designed the distributed outsourcing process, including initiation, implementation and governance and on-boarded major clients such as Alliance Bernstein. His work there included contract negotiation, recruitment, as well as overall management of the outsourcing process.

While lead Project Manager and Chief Architect for the Bank of America, AIG and other leading financial services firms he has led the successful implementation of large-scale systems for interest and credit rate derivatives, municipal bond trading, banking and compensation systems and an on-line derivatives and collateral management system.

He has also delivered solutions for the Insurance, Healthcare and Transportation industries, and is familiar with a broad variety of technologies and development methodologies.

Joseph is an accomplished speaker and lecturer and has published articles and lectured on technology.