

Joseph Goldman

Associate Advisor

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Joseph Goldman has over 20 years of Technology and Operations management experience in Financial Services Capital Markets.

Joe's career progressed rapidly through the ranks of Information Technology departments at some of Wall Street's most prestigious firms. His application knowledge spans the spectrum of both buy-side and sell-side organizations with specialties in Order Management, Trade Flow Execution, Confirmations, Settlements, Portfolio Accounting, Performance and Attribution, Pricing and Valuation, Margin and Collateral Maintenance, Segregation, Client Reporting, Fund Accounting, Subscriptions and Redemptions and an array of Financial Systems such as Accounts Receivable, Accounts Payable and General Ledger Accounting. He also maintains functional expertise across all Equity, Fixed Income and Derivative products, including Alternative Investments such as Private Equity, Real Estate and Life Insurance. Joe ultimately transitioned to Operations Management where he built and led teams of Global Project Managers and Business Analysts as well as assuming responsibility for various line functions.

After beginning his career within the financial industry at Shearson Lehman and then Thomson McKinnon, Joe consulted at Dean Witter, Deloitte & Touche and Lehman Brothers and Goldman Sachs. He worked at Goldman Sachs Asset Management for a total of 13 years where he helped define their global operating model, reengineer their business processes and build an architecture and application suite that exceeded demands of both internal and external clients. He ensured the uninterrupted flow of business through industry events such as T+3, EMU and Y2K, as well as bringing new offices (Germany and India) and applications on-line, and taking offices (Hong Kong and Singapore) and applications off-line. Joe joined Bear Stearns as Managing Director with a mandate to build a Global Projects team that would address end-to-end issues across Derivatives division. Joe excels at communicating with integrity to all levels of the organization, and developing relationships with clients, business partners, regulators and industry counterparts.

Joe earned his degree in Computer Information Science and Economics at Brooklyn College of the City University of New York.