

## Mr. David Osborne – Mortgage and Capital Markets Technology

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**Background:** David Osborne is a Financial Services consultant with 30+ years' experience working with large Financial Services and Enterprise Software firms focused on Technology Transformation, Business Strategy, and Client Service with a focus on Operational Efficiency, Architecture, Change Management, and Technology Asset and Delivery Services Optimization. His senior line management experience includes key roles at major global banks/investment banks, and investment companies' and technology services' Operations and IT organizations. He is well-versed in establishing/maintaining C-Suite (CIO, CTO) client relationships having executed several complex Technology and Service Delivery projects and engagements.

**Industry Knowledge:** He brings a broad base of expertise and professional experience, including improving financial services organizations' performance; transforming and modernizing technology operations and service delivery; and, enhancing revenue and client service. Areas of expertise include technology planning, resource management, service and applications delivery and support, and oversight of all projects undertaken by a company's IT department, including introducing new technologies to effect impactful service and operations outcomes.

**Experience:** As SVP of Architecture, Information Management and Shared Services functions (Bank of America), Mr. Osborne led the technology support for Consumer Banking Operations. He oversaw the firms' architectures and data/information management strategies to support large-scale (+200M) programs, including Mortgage Origination & Servicing. He also led a team of 900+ technical resources to (a) Develop roadmaps across Consumer products – Retail, Card & Lending; (b) Lead major programs to align with the bank's architectural and infrastructure standards; and, (c) Lead replacement of hundreds of applications via large-scale transformation.

In this role, he managed large-scale enterprise transformation projects, driving the strategy and methodology for successful delivery of large complex, distributed solutions, where he defined the strategic direction, architecture, methodologies, processes and management of technology professionals (900+) supporting the delivery of applications to support institutional asset management clients, while driving cost efficiency through implementing as-a-Service solutions and reducing infrastructure costs (by \$70M) while managing a project budget of \$100M+. Mr. Osborne also delivered shared service capabilities to provide Security, SOA, Workflow and Business rule management services across Operations and the enterprise.

As Managing Director/Global Chief Information Officer (Bank of New York Investment Companies), Mr. Osborne led overall program delivery strategy and methodology for the delivery of large (\$60M+), complex, distributed solutions to support the Bank's Investment & Asset Management clients and to improve IT management practices and success rate of applications – through improved practices, governance, resource upgrades, transparency, and Organizational optimization.

While a Managing Director/CIO, Global Markets of Deutsche Bank, he was responsible for delivery of electronic distribution solutions for Global Markets product groups (including Sales, Research, FX and Fixed Income), and focused on creating an environment and infrastructure to support a high-growth business based on shared platforms and services.