Spencer M. Rosenberg

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SUMMARY

Experienced Product Manager building award-winning fintech products for wealth management. Prior experience working in operations at early-stage startups in ed-tech and crypto.

PROFESSIONAL EXPERIENCE

Morgan Stanley **New York, NY**
Product Manager **March 2022–Present**

- Collaborates with a cross-functional team building Morgan Stanley's Portfolio Risk Platform, managing $4.5T AUM.
- Led 0-1 design, rollout, and launch of investment recommendation tool, facilitating $192M in new advisory assets in first quarter, approximately $7mm ARR.
- Heading implementation of new LLM AI portfolio commentary functionality.
- Managed growth strategy to achieve 25.2% YoY increase in platform use and hit goal of 90% adoption among core stakeholders.
- Built and published dashboards for tracking product usage data and other KPIs with Tableau, Dataiku, SQL, and Snowflake.
- Skilled in Agile software development processes- Scrum, Kanban, Jira, roadmapping.
- Hosts weekly product demos and leads sales calls for users and prospects.

Morgan Stanley **Chicago, IL**
Registered Associate **January 2020–March 2022**

- Managed operations for wealth management teams with over $1B AUM.
- Led marketing strategy for client adoption of the firm's digital banking services.
- Researched funds, securities, and macroeconomic information for clients.
- Passed CFA Level 1, Series 7, Series 66, Series 63, and SIE.

EDUCATION

University of Michigan **Ann Arbor, MI**
Bachelor of Arts in Economics **2015–2019**

ADDITIONAL PROJECTS AND EXPERIENCE

Startup Experience

- Spent summers from 2014–2019 supporting COOs at an ed-tech company, a code academy, and an institutional brokerage working on cryptocurrency mining.
- Built a marketplace website for users to buy and sell tickets via a bid/ask system.