

# TYLER J PARDEE

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Financial services professional with 8+ years' experience looking to transition to a product-focused role. Passionate about creative problem-solving, product ideation, market data, and mutual fund performance. Perfectionist with an eye for detail and identifying inefficiencies. Recognized for strong work ethic, critical thinking, time management, and team management skills. Intrinsically motivated by a competitive can-do mindset, proven to excel under pressure in fast-paced environments.

## WORK EXPERIENCE

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### Assistant Vice President, State Street Corporation

**Boston, MA**

Director of Fund Administration (Treasury Services)

*May 2018 - Present*

- Coordinate daily client service across eight client accounts with over \$450 billion combined AUM
- Responsible for managing client expectations and maintaining positive client relationships
- Operations role with primary focus in mutual fund performance, total return calculations, dividend income projections, dividend rate calculations, and portfolio turnover calculations for mutual funds and ETFs
- Oversee and manage a team of 12 financial service professionals across three locations to ensure all tasks are completed and delivered in a professional and timely manner
- Brought onto a large client account to identify data inaccuracies and conduct a six-month-long reconciliation of all historical data—provided various impact reports and put controls in place to help rebuild the client relationship

### Officer, State Street Corporation

**Boston, MA**

Assistant Director of Fund Administration (Treasury Services)

*June 2017 – May 2018*

- Tasked with interviewing, training, and managing associate level employees
- Integral contributor to State Street's offshoring initiatives and the relationship with our counterparts in Hyderabad and Bangalore, India—optimized workflow to take advantage of the time difference between locations
- Responsible for managing the performance database and providing clients with total return calculations

### Senior Associate, State Street Corporation

**Boston, MA**

Manager of Fund Administration (Treasury Services)

*September 2016 – June 2017*

- SME of Confluence Unity performance system. Successfully onboarded and reconciled performance for 500+ funds
- Leveraged Excel & VBA skillset to construct Access and Excel tools to accelerate the platform conversion
- Gained an in-depth understanding of net, market, gross-of-fee, pre and post liquidation after-tax total returns calculations as well as dividend projections
- Developed and presented excel macros that are used department wide and have proven to effectively save resources and shorten completion time

### Associate II, State Street Corporation

**Boston, MA**

Future Focus Development Program

*June 2015 – September 2016*

- Awarded the 2016 Risk Excellence Award for developing Outlook scripts that saved incoming email attachments to shared locations based on keywords within email
- Built excel macros and models to analyze budgeted amounts and suggest daily accrual adjustments

## TECHNICAL SKILLS

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**Microsoft Suite:** Advanced Excel, VBA/Macro Development, Access, Outlook, PowerPoint, Word

**Business:** Bloomberg, FactSet, Capital IQ, Expense Manager, Multi-Currency Horizon (Accounting), Confluence (Performance)

**Other:** HTML, CSS, JS, React, NodeJS, Git, Adobe Photoshop, Adobe Illustrator, Figma, Tableau, VSCode

## CAREER DEVELOPMENT

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- 2018 Rising Star Award
- 2016 State Street Risk Excellence Award
- State Street Global Services Mentee
- Future Focus Development Program Mentor
- State Street Golf Society
- Disability Awareness Alliance cookout volunteer
- Disability Awareness Alliance reception and networking event
- Disability Awareness Alliance charity golf & auction volunteer

## ACADEMIC EXPERIENCE

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### Bryant University

**Smithfield, RI**

Bachelor of Science in Business Administration, *Cumae Laude*

*Class of 2015*

Major Concentration – **Finance** Minor Concentration – **Legal Studies**

### Archway Investment Fund

**Smithfield, RI**

Portfolio Manager, Securities Analyst

*September 2014 – May 2014*

Selected to manage an investment portfolio valued over \$1,000,000

### The Odin Project

**Boston, MA**

Full Stack JavaScript Curriculum (Advanced CSS & HTML, Javascript, React, NodeJS, Git)

*January 2022 – Present*

Portfolio: [www.tylerpardee.me](http://www.tylerpardee.me)