

CURRICULUM VITAE



Personal Information

Name	Roger Goetzendorff
Address	Max-Born-Weg 37, D-85748 Garching b. München
Phone/Mobile	+49.89.38591227 / +49.172.162.5848
E-mail	roger@goetzendorff.com

Major projects – consultancy

06.2014 – 12.2016 Project Management Munich, Germany	UniCredit Release upgrade of TripleA PM for creating and implementing global Xframe/2 (Java/ Struts/ Hibernate/ Spring/ Linux/ Oracle etc...) applications with an international team (Italy, Germany, Rumania, Poland) International MiFIDII test management
08.2011 – 02.2012 Project Management Munich, Germany	MunichRe Project management implementing a CALYPSO-based hedging platform
04.- 07.2011 Consulting	DV Ratio Consultant for international banking projects, support regarding FATCA, KEST AT, anti-money laundering
09. – 03. 2011 Project Management Milan, Italy	Kedrios Milan International Project for Xchanging/Kedrios
07.– 12.2010 Project Management Düsseldorf, Germany	HSBC TuB Düsseldorf Implementation of standard software for recovering foreign taxes.
10. – 12.2009 Project Management Munich, Germany	Prokon Nord Managing the whole emission process of a 50-million-€ Asset. Instrument planning, finding handling bank through call center planning and subscribing issues.
01. - 08. 2007 Strategic Consulting Miltenberg, Germany	Mentopolis GmbH Consulting project for internationalization of a financial valuation tool based on IAS 39.
11.2006 – 01.2007 Project management Munich, Germany	HVB Adjustment of Portfolio Management System to become MiFID compliant
11.2005 – 05.2006 Consulting Conflans St.-Honorine, France	Saint-Gobain Abrasives Implementation of a Data Warehouse System Targeting the integration of the HR data present at European level
2004 – 2005	Startrading Ltd.

	Management consulting Moscow, Russia	Supporting the director modernizing the company (Architects studio with own building branch)
2000 – 2002		Comdirect
	Strategic Consulting Quickborn, Germany Milan, Italy	IT organization Infrastructure planning of the new comdirect, Milan Implementation CRM software, Call Center set-up
2002		Ecosoft GmbH
	Strategic Consulting Munich, Germany	Restructuring the company
2001		SELFTRADE Italia
	Strategic Consulting Milan, Italy	Consulting regarding international corporate actions
2000		CISAL - Commerzbank Luxembourg International
	Strategic Consulting Luxembourg	Adjustment of Portfolio Management System to become Year2000 compliant. Redenomination of assets from IN-Currencies to Euro
1997		HSBC Trinkaus und Burkhard
	Project management Düsseldorf, Germany	Installation of new Order Routing Software Organization of XETRA interface
1993		DEVK
	Project management Cologne, Germany	Project introducing VVS-PC (a portfolio management system for assurance companies) after having it ported from PC to UNIX(SINIX) and ORACLE. Test management. Recon processes regarding consistencies.
1990		Commerzbank
	Project management Luxembourg	System integration for new portfolio management system
1988		WestLb
	Project management Düsseldorf, Germany	System integration, interface to master data delivery system WM.
1987		BW Bank
	Project management Stuttgart, Germany	Introducing withholding tax. Test management.

Employee experience

1995 – 2006		IPCSoft
	Product Manager, Head of IT Milan, Italy	Creating a software package for broker and banks (GPS - Global Position System): portfolio management, asset management, position keeping and order management
1994		DANUBIOSIM Broker House

	Head of IT Milan, Italy	Responsible for IT availability and market access
1985 - 1994		AWS - Anwender Software GmbH
	Product Manager Client Manager Foreign Area Munich, Germany	Responsible for a main-frame software package for portfolio/asset management

Working experience – overview

2006 - today	Freelance consultant
1995 – 2006	Head of IT, Partner, IPCSOFT s.p.a. , Milan, Italy – Software House for Banks and Brokers
1994	Head of IT, DANBIOSIM s.p.a. , Milan, Italy – Broker House
1985 -1994	Product responsible AWS GmbH , Munich, Germany – Financial Software House

Functional skills

System Integration	Long term (GT 15 years) experience in interfacing high complex scenarios in banking environment. Always very close to follow rapid changing customer requirements
Taxation	Organizing the general approach for the international overall test management for MiFIDII of UniCredit. Implementing withdrawal tax and capital gain tax in wealth management systems in banks and broker houses. Implementing QI relevant tasks in a private bank in Luxembourg.
Financial instrument skills	All back office processes, from internal pre booking to payments and recon with external clearing institutes. Knowledge of particularities, i.e. corporate actions, irregular coupons in unexpected currencies and many more. Knowledge of compliance requirements. Front office: long-term experience in portfolio management, asset management and order routing. Back office: long-term experience in project management for booking, compliance, reporting. IPO knowledge after having developed a web application managing IPC process, including pre-sales pricing calculation, subscriptions, assignments and final transform to tradable share
Hight Wealth Customer area and Portfolio Management	Long term experience handling requirements, also regarding reporting, group order and CRM
Online banking skills	Due to the experience collected producing a software package in this context, guaranteed skill in management and success. Special knowledge regarding safety, dealing with external partner (clearing houses, stock exchange...).

IT skills

Applications	Kondor+, Murex, Calypso, Atlas, Reuters, Rolf&Nolan, URBIS...
Software	all kind of development languages and tools several operating systems, including main frame, host and PC systems from several vendors (IBM, Siemens, MS, Sun etc.) all kind of data base systems, such as Oracle, DB2, VSAM, LEASY, Informix, Sybase
System integration	Strong experience in interfacing very different environments

Tools and process at last major bank's project

Processes

- Project tailoring (planning, alignment, execution of necessary tasks)
- Internal approval processes (e.g. IT-board level 1 or 2)
- Solution proposal management (proposal and scope change)
- Defect and incident management with internal and external reporting
- Infrastructure management

Tools

- PPM
- HP ALM -
- HP Service Manager
- Metadata Repository
- Security Gate
- Gandalf3
- AAM 2.0
- Ticket Online
- Prodox
- FPA

Education

1976 – 1985

Electrical engineering at Technical University Munich, Aerospace at German Federal Armed Forces University Munich, Engineering at polytechnic school of Barcelona

Languages

Mother tongue

German

Other languages

Fluent: English, Spanish, Italian, and French. Good Catalan. Basic Russian.