

Michael C. Coleman, MBA

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PROFESSIONAL EXPERIENCE

Retirable, Software Engineer II

March 2020 - Present

- Founding member of Retirable's engineering team, responsible for the development of Retirable's financial planning offerings, incorporating experience as a Certified Financial Planner, MBA graduate, and software engineer.
- Collaborate with Retirable's team of advisors to design, roadmap and build Retirable's financial plan delivery product, which enables advisors to collect the details of a client's life, along with their financial goals, to propose a financial plan.
 - Use of financial planning tool has resulted in Retirable's AUM growing from \$0 to \$20m+ to date.
- Coordinated with members of the marketing team to design and build framework to test direct-to-consumer acquisition funnels. Upon the framework's launch, built an analytics dashboard using Amplitude to monitor and analyze results.
- Roadmapped and developed a highly performant static [website](#) and blog using Gatsby.
- Developed Retirable's banking integration through the use of [Unit](#)'s API.
- Participated as a key member of Retirable's culture team, driving positive employee experiences and fostering a vibrant and inclusive work environment, including planning and leading remote-friendly employee events.

EquityMultiple, Software Engineer

April 2019 - March 2020

- Collaborated with members of the operations team to reengineer the investment return distribution process; redesigned tools enabled one operations associate to manage all monthly distributions.
- Queried EquityMultiple's internal databases to collect and prepare analytics reports for members of the leadership team.
- Leveraged previous finance experience to build and maintain EquityMultiple's online real estate investment platform.

Betterment, Financial Planner

March 2016 – August 2018

- Founding member of Betterment's human advice team; defined new offering's operational processes and created guidelines to ensure consistent advice was provided to each customer.
- Served as embedded subject matter expert in the product and engineering team to craft Betterment's digital product. Worked with internal and external stakeholders to identify and improve customer pain points.
- Interviewed with members of the media regarding specific financial planning topics.
 - Ex. [Financial Advisor Magazine](#) on the importance of establishing emergency fund and considering liabilities.
- Collected and shared frequent customer questions and concerns to the broader company in order to facilitate building better products and services to solve our customer's needs.
- Worked with higher net worth individuals to transition from legacy portfolios to Betterment's core portfolio, with particular attention paid to overall allocation, tax ramifications and cost savings.

Merrill Lynch, Analyst

February 2014 – March 2016

- Organized and coordinated the transition of existing client portfolios from legacy piecemeal strategies to a new investment platform and portfolios. New portfolios increased customer diversification, improving client outcomes while the new platform enabled one associate to manage all portfolios and strategies.
- Met with high net worth clients with wealth in excess of \$1m to define their various financial goals and objectives; proposed and implemented financial product solutions to help them achieve their specific aspirations.

EDUCATION

Rice University, Remote

July 2019 - December 2021

Masters of Business Administration, Corporate Finance & Investment Management Concentrations

Bates College, Lewiston, ME

August 2009 – May 2013

Bachelor of Arts, History Major, Religious Studies Minor, Dean's List – Fall 2012 & Winter 2013

SKILLS & INTERESTS

Certifications: Certified Financial Planner, Series 7 (expired), Series 66 (expired), Life & Health Insurances Licenses (expired)

Technical Skills: Microsoft Excel & PowerPoint, Data Analysis, Financial Modelling, Product Development, Software Development, Google Analytics, Amplitude, Segment, Ruby, Ruby on Rails, Python, React, Gatsby, Next.js, Typescript, RestAPIs, GraphQL, CI/CD, HTML, CSS, SQL, Sinatra.

Volunteer Activities: Portland Adult Education English Tutor

Personal Interests: Running, Cross Country Skiing, Hiking, Camping, Fly Fishing, Canoeing

Personal Accomplishments: 2023 [Birkie](#), Eagle Scout