

# Position Specification

**Confidential**

## **Vice President of Technology Infrastructure Architecture**

### ***The Company***

Our client provides wealth management, securities brokerage, banking, money management, and financial advisory services through its subsidiaries.

They provide financial services to individuals and institutional clients through two segments – Investor Services and Advisor Services. The Investor Services segment provides retail brokerage and banking services to individual investors, retirement plan services, and corporate brokerage services. The Advisor Services segment provides custodial, trading, and support services to independent investment advisors, and retirement business services to independent retirement plan advisors and record keepers.

### ***The Position***

#### ***Overview***

This newly created position will be responsible for setting the long term architecture strategy and vision for the physical and virtual infrastructure across the enterprise. This broad mandate will include hosting, cloud, data centers, environments (private and public) and networks. The leader will establish the vision, publish the strategy and define the architecture for infrastructure and environments for all company solutions. The successful candidate will lead a central group of architects and engineers, and leverage hundreds of talented technologists in the firm to establish and evolve the infrastructure standards for the company.

This officer position is critical to the sustained, strategic leadership of the company in its market. It will play a vital role in the company's DevOps journey and continued implementation of solutions that optimize accountability, productivity, availability, scalability, and sustainability. This leader will partner with and employ the services of the Extended Senior Management Team, Technology Strategy Leadership Team, CTO Working Group, and Technology Infrastructure Services.

#### ***Location:***

Southwest United States

#### ***Reporting Relationship***

Reports to the Senior Vice President of the Office of the CTO. This VP role will lead a team of approximately 20 of the company's most senior architects and guide the infrastructure architecture at the company, served by over 800 infrastructure professionals.

### ***Responsibilities***

- Lead, guide, specify target cloud, data center and infrastructure strategies and architectures.
- Maintain a healthy understanding of market trends through direct research and participation, as well as through others.
- Oversee and shepherd data center strategy to ensure it moves into execution phase within the first year.
- Clearly articulate a hybrid cloud strategy and ensure it is thoughtful, thoroughly researched, well expressed, well communicated and adopted.
- Cultivate a strong working relationship with the Technology Infrastructure Services organization to ensure effective implementation partnership for immediate and mid-term infrastructure initiatives.
- Partner with Enterprise Architecture in the Office of the CTO to define, evolve and lead the architecture practice at the company.
- Partner with Platform and Applications Architecture in the Office of the CTO to lead application architecture strategies.
- Partner with Technology Strategy in the Office of the CTO to manage, communicate and develop the company's overall Technology Strategy.
- Partner with Delivery Experience in the Office of the CTO to ensure that developers and technologists at the company have the best tools, practices and experience to continuously deliver great product into the hands of the company's clients.
- Oversee and develop an extraordinarily talented team of architects and engineers who provide a high level of thought leadership, architectural consultation and solution design.
- Partner with the business and executives throughout the firm to represent the capabilities of technology and the value to the business.

### ***The Candidate***

#### ***Education***

- A Bachelor's degree is required and a master's degree and / or other professional certification is considered a plus.

#### ***Professional Qualifications***

- A minimum of 15 years of experience in a technology leadership role, both management and infrastructure; 10+ years leading data center or infrastructure architecture, specifically, as well as 5+ years working alongside commercial vendors on long-term enterprise solutions.
- At least 10 years of distributed data center experience, including a blend of public cloud and private solutions.
- At least 5 years of DevOps experience and a minimum of 5 years of middleware and infrastructure development and management experience.
- Demonstrated success quantifying and validating returns on investment for infrastructure technology.
- Experience managing a significant budget and hiring plan with material enterprise-wide business impact maximizing the investment.
- Experience managing highly talented technologists.

### ***Personal Characteristics***

- Results oriented leader who takes the initiative and effectively distills strategy, analytics, and varied sets of input to drive to decisions and follow through to execution.
- Strong business influence skills and able to shape, define and present a complete and thorough picture of the company's control environment including developing thoughtfully-written action plans, well-executed remediations and clear/regular communication to executive management.
- Experience in successfully leading change through complex environments and organizational structures.
- Leverage strategic and analytical capabilities to make sound, timely decisions based on client and field input supporting and maintaining a strong production environment including evaluating risk versus expense versus the client experience.
- Able to act decisively in making solid, informed judgment calls in response to both the technological and critical regulatory environment and the day-to-day business issues.
- Extremely strong client relationship management and negotiation skills required with the ability to assess and effectively communicate processing capabilities and identify alternative solutions for clients and business partners.
- Outstanding written and verbal communication skills with demonstrated ability to communicate effectively with all levels of an organization.
- Strong emotional intelligence/maturity and substantial senior level executive presence.
- Experienced in effectively assessing, selecting and developing talent for the firm; adept at providing balanced, direct and actionable feedback to employees. Experience managing multiple priorities and overseeing distinct teams with varied strengths.
- Thrives on initiating, building and cultivating strong authentic relationships inside and outside the group; highly collaborative; navigates and activates alignment across organizational silos.

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**To learn more about this opportunity or provide a confidential referral, please contact:**

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**Please use this reference code in the subject line of your response:**

*Reference Code: 460-07\_VP-Technology-Infrastructure-Architecture\_PPI*

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