

Jose Paiva Sobrinho

josepaiva@gmail.com • (551) 333-4350

Technology Leader

Accomplished **leader** with extensive experience overseeing **high-performing technology teams** through complex **Private Equity software projects** and **digital transformations** in the **financial services sector**. Excel at **orchestrating seamless execution of major software implementations, architecture migrations, cloud replication strategies, and infrastructure move/decommissioning**, with a proven track record of delivering **critical initiatives** that enhance **operational efficiency** and **application resilience**.

Skilled in collaborating with **senior leadership** to identify **technology needs** and **improvement opportunities**, driving **project momentum** through **clear communication** and a **sense of shared purpose**. Leverages a strong foundation in **software engineering** to **innovate** and meet **regulatory requirements** while demonstrating **exceptional project management expertise** as the primary **Subject Matter Expert** for **Investran**. Committed to **continuous improvement** and consistently recognized for achieving **top performance rankings**.

Platforms: Investran/Yardi/MRI/Intacct/Aexeo Portals: InvestranDX/Intralinks Cloud Environments: AWS/Azure Mgmt: Agile/PMP Cert.

Areas of Expertise

- Technical Leadership
- People Management
- Software Engineering
- Subject Matter Expertise in PE Platforms
- Infrastructure Management
- Vendor Engagement
- Strategic Planning & Execution
- Team Building & Mentorship
- Cross-functional Collaboration

Professional Experience

State Street Bank

January 2019 — Present

Development Team Lead / Application Owner

Manage multiple private equity applications, including Investran as a primary application owner at State Street, steering complex, cross-functional projects by collaborating with diverse matrix teams and ensuring clear communication of roles and responsibilities to promote respect and teamwork. Drive innovation and ensure compliance with regulatory standards through a strong foundation in software engineering and expertise in multiple platforms, enabling effective integration and continuous improvement in project and program management.

- **Optimized private equity technology infrastructure** by leading major platform migrations, upgrades, and EOL system decommissioning, ensuring full compliance with legal and regulatory standards.
- **Drove a 35% improvement in infrastructure efficiency** by successfully migrating 150+ servers to AWS and decommissioning 200+ outdated servers, reducing operational costs.
- **Designed and implemented a high-performance cloud replication strategy**, leveraging Snowflake for critical applications (Talent, Waterfall, QlikSense, Alteryx, Anaplan), enhancing data availability and resilience.
- **Transformed project execution by integrating technical expertise with strategic leadership**, delivering sustainable improvements in infrastructure and application scalability.

Private Equity Product Owner

- **Developed and launched multiple automation solutions**, including Valuations Processing Data Engine and Capital Allocations & Management Fees Engine, streamlining financial workflows for private equity clients.
- **Enhanced financial reporting accuracy by 40%** through the creation of automated DTCC AIP Position & Valuation Data Feeds and Intacct-to-Investran DIU Data Mapping.
- **Led GDPR and Privacy Shield compliance initiatives**, conducting detailed data privacy assessments to ensure regulatory adherence.
- **Optimized reporting efficiency** by implementing advanced Qlik NPrinting features, reducing manual report generation time by 50%.

Citco Fund Services

April 2014 — December 2017

Program Manager

As a hands-on Program Manager, orchestrated the simultaneous execution of multiple high-impact projects, including:

- **Executed enterprise-wide platform upgrades for Investran and Yardi**, modernizing infrastructure to support private equity operations.
- **Designed and deployed an investor portal**, integrating standard reporting, live dashboards, and secure data rooms using QlikSense, improving investor transparency.
- **Designed the concept and managed the deployment of an in-house Waterfall calculation tool**, increasing the accuracy and efficiency of fund distribution calculations for private equity clients.

Additional Experience

JPMorgan Chase Bank

Application Integration Manager

- **Advanced from developer to technology leader within 15 years with this organization.**
- **Led the execution of a top 10 global project at JPMorgan**, overseeing the integration with all legacy Brazilian systems, streamlining financial transactions and improving functionality.

Private Equity Custom Solutions - Team Lead

- **Coordinated development of strategic projects within the Private Equity and Real Estate departments**, leveraging expertise in Investran and MRI platforms.

Application Development Manager

- **Developed and launched the Stable Value reporting application**, strengthening financial accuracy and streamlining accounting workflows.

Education / Volunteering



MBA in Banking
FIA University, Sao Paulo, Brazil

BS in Business Management
Amberton University, Dallas, TX



Head of Technology Volunteer

English Teacher Volunteer – Jacksonville/FL.