

Galit Ben-Joseph

Summary

Seasoned professional with over 20 years of financial services experience. Outstanding communication and presentation skills; as well as market and economic knowledge. Academic interests are focused on Organizational Behavior, Management, Motivational Theories, and the effect of family responsibilities on working mothers.

Education

Pace University, The Lubin School of Business, New York, NY
Doctorate, Management and International Economics, May 2012, G.P.A.: 3.8 / 4.0
Elected to Beta Gamma Sigma, International Honor Society

Dissertation: "The Effect of Family Responsibilities on Working Mothers"

Proposal Meeting: November, 2011

Defense Meeting: April, 2012

Dissertation was accepted for inclusion by the 2012 Eastern Academy of Management Conference, and will be published in the proceedings manuscript . Invited to present research and findings during conference, in an individual session (May, 2012).

Baruch College, The Zicklin School of Business, New York, NY
M.B.A., General Option with Management Concentration, August, 2000, G.P.A.: 3.5 / 4.0

Columbia University, New York, NY
M.A., Organizational Psychology, February, 1998, G.P.A.: 3.9 / 4.0

Rutgers University, Rutgers College, New Brunswick, NJ
B.A., English, With Honors, May, 1994; Dean's List every semester, G.P.A.: 3.7 / 4.0,
Elected to Phi Beta Kappa

Junior Year Abroad: University of Haifa, Kibbutz Bet HaEmek, Israel

Academic Experience

Yeshiva University, Sym School of Business, New York, NY
Adjunct Instructor, Spring 2013 Semester: Organizational Behavior
Adjunct Instructor, Fall 2012 Semester: Business in a Global Environment (Regular and Honors Track)
Adjunct Instructor, Spring 2012 Semester: Organizational Behavior
Adjunct Instructor, Spring 2011 Semester: Principles of Management
Adjunct Instructor, Fall 2010 Semester: Business in a Global Environment

Continually provide informal mentoring and career advice to students. Some examples include:

- Introduced a student for a full-time position at a prestigious investment firm; student was hired
 - Worked with a student to secure part-time work and an internship at a top Accounting firm
 - Provided a student with detailed feedback on business plan, and provided introductions and set up meetings with accountants, attorneys and investors.
-
- ◆ **Participated in many Career Development Center Events, including, but not limited to Mock Interviews and Panel Discussions. Provide open job requisitions to the CDC frequently.**
 - I have made myself available for any follow up meetings on a regular basis. Students reach out to me through e-mail regularly and approach me on campus very often.
 - ◆ **Attended Presidential Fellowship in University and Community luncheon, sponsored by President Richard Joel and Rabbi Joshua Joseph, with Guest Speaker Alfred Moses. Offered insights and followed up individually with several students. February, 2012**

- ◆ Provided senior-level resource to present at the Doris and Dr. Ira Kukin Entrepreneurial and Executive Lecture Series Guest Speaker, including introductory remarks and attendance in breakfast meeting prior to the speech
- ◆ Arranged for established professionals to attend my classes as guest speakers for real-life knowledge sharing and insights. Some examples include: YU graduate at top investment bank, Successful Real Estate Business Owner, Hedge Fund investor, and Head of Recruiting at Global Fortune 500 Firm
- ◆ Consistent and outstanding student evaluations.
- ◆ Presented as a guest speaker and panel participant to a "Making Equal Pay a Reality in New York" event with New York Senator Kirsten Gillibrand at New York University Law School, April 2012

Berkeley College, New York, NY

Adjunct Instructor: Fall 2009 Semester: International Business, Principles of Management

Professional Experience

NEUBERGER BERMAN LLC

**New York, NY
9/08 - present**

Vice President, Wealth Advisor, *Wealth Management*

- ◆ Responsible for all aspects of wealth advisory services for high net worth clients including: asset allocation, manager selection, trading, performance analysis, and trust and estate planning
- ◆ Responsible for the portfolio analysis and asset allocation associated with 100 highly customized, ultra-high net worth client accounts, with in-depth knowledge of the following products:
 - Fixed income, equities, mutual funds, hedge funds, and private equity
- ◆ Achieve a 100 percent client retention rate year over year, and over 30% in annual growth of revenue

GOLDMAN, SACHS & CO.

**New York, NY
1/01 - 9/08**

Vice President, *Private Wealth Management*

12/05 - 09/08

- ◆ Responsible for the portfolio analysis and asset allocation associated with 300 highly customized, ultra-high net worth client accounts, with in-depth knowledge of the following products:
 - Fixed income, equities, mutual funds, hedge funds, private equity, and structured notes
 - Execute complex trading transactions on a daily basis

Vice President, *Operations and Administration*

1/01 - 12/05

Responsible for all aspects of Project Management, including: Definition, Planning, Design, Coordination of Development, Testing, Marketing, Training, Implementation, and Support

- ◆ Global Project Manager for Management Information System / Metrics Dashboards Application
- ◆ Global Project Manager for the leading industry eCommerce application (Ariba Buyer, v7.10)

Chairperson, *Services Women's Network*

9/04 - 11/04

- ◆ Selected by Senior Management to lead the activities of the Services Women's Network
- ◆ Responsibilities include: strategy/direction, budgeting, planning, execution of events, and follow up

Divisional Captain, *Cornell University*

9/04 - 12/05

- ◆ Selection by Senior Management to lead the recruiting activities at Cornell University

J.P. MORGAN CHASE

**New York, NY
8/94 – 8/00**

Vice President, Business Services

4/98 – 8/00

- ◆ Developed all material and strategy for the “Intelisys Electronic Commerce” implementation including: project plan, issue reporting, metrics criteria, marketing, weekly updates, and user acceptance testing.
- ◆ Implementation success has resulted in financial (reduction in overall cost) and non-financial benefits (reduction in total cycle time, reduction in delivery time). Average savings are 15 – 20% off of baseline.

Speaking Engagements

Invited guest speaker to present success of e-Commerce initiative at the following conferences:

Managing Purchasing Strategies in Cyberspace	Amsterdam, The Netherlands	11/99
e-Business for Corporate Treasury	Brussels, Belgium	4/00

Assistant Vice President, Management Consulting Center

2/97 – 4/98

Project Manager, Sourcing Engagements

- ◆ Participated in the sourcing of Credit Bureau and Market Data (Hong Kong) commodities, which resulted in annual savings of \$3.5MM (\$24.0 MM baseline) and \$11.0MM (\$69.0 baseline), respectively

Assistant Treasurer, Global Investor Services

1/96 – 2/97

- ◆ Assumed full responsibility for large portfolio client pension plans, exceeding 1.8MM annual disbursements, and one billion dollars annually
- ◆ Responsible for managing a diverse staff of 14 through all aspects of change, including new systems integration and merger-related systems consolidations
- ◆ Increased productivity and moral by creating initiatives to promote employee job satisfaction

Trainee, The Leadership Management Development Program

8/94 – 1/96

- ◆ *A highly competitive, eighteen month training program designed to develop a first line operations manager. Training consists of a series of rotations through various core areas of the bank, (product development, production management, customer service, financial planning, risk control and people management concentrations), concluded by presentations to senior managers. Experience is supplemented by seminars and workshops.*

Volunteer

Bnei Jeshurun. Prepare beds, serve meals, and dine with the homeless. (1999-present)

The Goddard Riverside Community Center. Provide mentoring to high school students. (2008 – present)

Leukemia and Lymphoma Society. Team Captain of Goldman Sachs Community Team Works Event (2005)

Everybody Wins. Mentor for weekly lunchtime reading sessions with 7 year-old child (2002 – 2005)

Harlem RBI. Coach and Team Captain of Goldman Sachs Community Team Works Event (2001 – 2003)

The Fresh Air Fund. Organized “summer in the country” departure session for 200+ children (8/2000)

Board Member of 520 East 72nd Street Owner’s Co-operative Association (1998 – 2000)

Languages

Fluent in Hebrew