

BRETT CLAWSON

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Executive Summary

Senior Product Management Executive and Modernization Architect with 25 years of experience architecting financial platform infrastructure, automated rules engines, and regulatory risk frameworks. Proven track record unifying multi-source financial data streams (Finicity, Ocrolus) into standardized Unified Data Models, scaling ML-driven submission engines to achieve +289.5% YoY revenue growth (\$10.9M cumulative revenue engine) and directing 13 years of regulatory software portfolios at FINRA. Recognized "Leader of Leaders" who has coached 15 Product Managers with 3 promoted to Director-level roles.

Core Competencies

Unified Data Model Design	Rules Engines	Product-Led Growth (PLG)
Regulatory Compliance	API Normalization & Ingestion	Process Optimization
Open Finance Data Streams	Portfolio Growth (+289.5% YoY)	PM Mentorship (3 Director Promos)

Experience

Lendio

Director of Product

October 2021 - Present

- **Commercial & ML Scale:** Directed implementation of ML-driven loan matching and automated rules engine strategies that grew feature revenue +289.5% YoY (\$3.99M to \$15.55M), delivering \$10.9M in cumulative top-line revenue across high-volume pipelines handling 5,300+ daily peak applications.
- **Platform Architecture & Unified Data Models:** Directed the architectural modernization of core underwriting infrastructure, unifying multi-source financial data streams (Finicity, Ocrolus) into a standardized Unified Data Model to deliver 99.9% data fidelity.
- **Data Classification & Latency:** Standardized third-party banking aggregator integrations within bank-service, reducing data classification latency by 40% and optimizing risk modeling accuracy across commercial credit channels.
- **Leadership Transformation:** Retained as a stabilizing executive through three corporate restructurings to transition operations from manual, sales-assisted workflows to automated borrower qualification and auto-submission pipelines.
- **Regulatory Compliance & Risk Architecture:** Architected compliance solutions across borrower evaluation pipelines, establishing audit observability and operational readiness for CFPB Section 1071 data capture, automated Adverse Action Notifications (AANs), and FCRA audit standards.
- **Organizational Redesign & Mentorship:** Designed a standardized product lifecycle operating model. Directly coached and mentored 15 Product Managers, resulting in 3 promotions to Director-level roles.

Vineyard City

City Council Member

November 2024 - December 2025

- **Executive Diplomacy & Public Governance:** Appointed from a competitive pool of 20 executive applicants (3-2 selection margin) to oversee municipal policy, infrastructure strategy, and multi-million dollar fiscal allocations for one of Utah's fastest-growing cities.
- **Legislative Consensus & Ethics Bylaws:** Chaired the Code of Conduct subcommittee. Organized and led a multi-stakeholder working group (city management, legal counsel, council peers, and citizens) across Jan-Mar 2025 to author municipal bylaws, bridging divided council factions to achieve a unanimous 5-0 adoption vote.
- **Fiscal Accountability & Audit Oversight:** Directed independent third-party financial audits and agreed-upon procedures reviews to enforce institutional transparency and fiscal alignment across city operations.

Shareworks by Morgan Stanley

Senior Product Manager

February 2019 - September 2021

- **Platform Re-Architecture & Performance:** Directed product strategy for Private Markets Equity Compensation tools, partnering with engineering to reduce core workflow load times from 5 minutes to 30 seconds (10x performance improvement).
- **Post-Acquisition Platform Integration:** Directed the functional integration and consolidation of acquired equity management tools (Capshare and Option Driver) into the core Shareworks platform architecture.
- **Product Analytics & Observability:** Established enterprise Pendo analytics across Private Markets products to track user behavior, eliminate workflow friction, and inform strategic roadmap decisions.
- **Technical Operations:** Managed technical operations and report generation for the Venture Capital Executive Compensation Survey (VCECS), eliminating legacy reporting inconsistencies.

Kuali, Lehi, UT

Senior Product Manager

1 Year 6 Months

- **Greenfield Product Discovery:** Directed 0-to-1 product discovery, market research, and requirements definition for core student enrollment modules within a greenfield cloud-based Student Information System (SIS).
- **Cross-Functional Execution:** Partnered with engineering and design pods to translate complex higher-education business rules into scalable technical specs and user stories.

FINRA, Rockville, MD

Director of Product

12 Years 9 Months

Promotions from Business Analyst (2004-2007) to Associate Director of Product (2007-2013) and to Director (2013-2017)

- **Cross-Functional Team & Delivery Leadership:** Directed the daily execution of up to 24 employees including product managers, developers, and SDETs across the Testing & Continuing Education and Legal application portfolios. Established hiring and coaching pathways that elevated early analysts into Lead Product Manager and managerial careers.
- **Regulatory Portfolio & Operational Optimization:** Directed enterprise compliance and exam applications supporting Testing & Continuing Education and Chief Legal Office workflows. Drove a 70% operational efficiency gain through data analytics and workflow optimization.
- **Agile Delivery Transformation:** Transitioned engineering teams from quarterly Waterfall release cycles to continuous Agile delivery cadences, accelerating feature rollout while maintaining zero-downtime for SEC/FINRA compliance.
- **Data Privacy & Governance:** Established data governance requirements through systems engineering to protect personal confidential information (PCI/PII) across regulatory databases.

Other Roles

Quality Assurance Engineer	Thomson Financial	2 Years
Technical Writer	Thomson Financial	2 Years
Support Specialist	Engenia Software Inc.	5 Months
Product Specialist	Primark Corporation	6 Months
Software Tester	Primark Corporation	4 Months

Education

MBA, Information Systems
Professional Certificate, Web Development
Bachelor of Arts, English

University of Maryland
George Mason University
Brigham Young University

Awards

Lendion of the Year (2026): Selected annually by executive leadership from a company-wide pool of employee nominations for exceptional cross-functional leadership, squad stabilization, and platform delivery.