

Summary Jeff is an adaptable leader who has spent more than 20 years at the intersection of technology, information security, regulation, compliance, and financial services, improving teams and programs to deliver results and improve customer experience. He is a Technology and Information Security executive who has held CIO, CTO, and CISO roles.

He was an Information Security Officer at Wells Fargo Bank, served as interim Chief Information Security Officer and Chief Technology Officer at Synovus Financial, and has been a Chief Information Officer for the last decade at Fremont Bank and Heritage Bank of Commerce.



Consulting Areas

- Information Technology
- Process Improvement
- Information Security
- Customer Service
- Infrastructure Management
- IT Financial Management

Expertise

- Strategic Planning
- Project & Program Management
- Regulatory Compliance & Auditing
- IT Cost Reduction
- Call Centers & Telecom
- Bank modernization
- Nonprofit management
- Customer Experience systems
- Zero-trust computing

Industry Verticals Served

Financial Services, High Tech, Software, Nonprofit, Telecommunications.

Representative Experiences

- **Digital Transformation** – As CIO at Fremont Bank led technology transformation to help the bank grow from \$2.7B to \$4B with a staff of 75. Delivered and supported all employee and customer technology. Managed vendors, developers, staff in India. Led major information security remediation program resulting in significantly improved compliance, security, recoverability, risk posture, and vendor management. Stabilized technology foundation to enable upcoming digital transformation projects. Deployed numerous new information security and fraud detection systems. Modernized bank technology. Moved to a cloud-based call center phone system. Consolidated 500 printers, faxes, copiers, and scanners into 80 multi-function devices with badge-in, print-anywhere access and value-added scan workflows. Converted 95% of the bank from traditional desktop PCs to log-in-anywhere virtual desktops with low energy-consumption thin clients.
- **Information Security Assessment and Remediation** – Served as “Interim CISO” for Synovus Financial in Columbus, Georgia. Kept critical regulatory projects moving, managed and brought stability to a team of 20, and assessed and improved the security program. Introduced a culture of risk management at this \$27 billion bank with 5,000 employees and 350 branches in 5 states. Worked with regulators, aligned the team with corporate goals, improved team morale and engagement, and envisioned a future state for technology and security. Reworked budget to increase capacity of the team, introduce new capabilities, and lowered overall spending to do more with less. Identified, recruited, and hired key talent to build the team, and raised the capability maturity level of the department. Managed the transition to a new CISO.
- **IT department interim leadership** – Served as “Interim CTO” for Synovus Financial in Columbus, Georgia. Managed all infrastructure technology groups with staff of 65. Restructured groups to align with standard practices and strategic objectives, and got bank technology turnaround on track. Stabilized technology, improving processes and increasing capability maturity level of IT group. Improved regulatory and audit tracking. Stabilized foundational technologies and processes, enabling the next level of transformation to the workplace of the future, allowing “bring your own device”, ubiquitous access, mobile work, and better recoverability.

Past Employers

Wells Fargo Bank, Robertson Stephens, Fremont Bank.

Education, Training & Certifications

B.S. Psychology, Tufts University

Ed.M. Administration, Planning, and Policy, Harvard Graduate School of Education

CISSP, CISA information security and auditing certifications and has held Series 7 and 66 securities licensure and the MCSE technical certification.