**LORI MOGOL**

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**SUMMARY**

* User Experience and Product Design and information architecture for responsive web applications
* Design and development of business to business, corporate, consumer, and internal applications
* Effective communication skills with clients, users, technology, and multidisciplinary teams

**EXPERIENCE**

**Charles Schwab**,Advisor Technology Solutions

Senior Manager, User Experience Designer (10/20-2/2024)

**TD Ameritrade** (acquired by Charles Schwab), Institutional Technology Solutions

Senior User Experience Designer (11/17-10/20), Jersey City, NJ

User Experience Lead (3/13-10/17)

Key Accomplishments:

* Designed user experience for [iRebal](https://advisorservices.schwab.com/irebal)®, an award-winning rebalancing application for financial advisors
* Won multiple performance awards for departmental excellence and colleague commendations
* Built successful relationships across product and technology teams

Collaborate with senior executives and key business stakeholders to design concepts and experiences that align with client needs and increase profitability for [institutional brokerage applications](http://www.tdainstitutional.com/):

* Participate in product design process to analyze user needs, business goals, and technical feasibility
* Apply user research activities, including user interviews, surveys, participatory design sessions, client training observation
* Create detailed wireframes and clickable prototypes for data-intensive applications
* Partner with technology to evolve concepts and designs into implementation
* Write style guides and documentation for use across product development teams
* Analyze site analytics
* Create help system for transitioning clients

**Fidelity Investments**,Securities Finance

User Experience Designer / Information Architect (2/12-12/12), Jersey City, NJ

Translated needs of business into effective user experience design for securities lending applications:

* Collaborated with technology and business teams to identify and refine requirements
* Interviewed users to assess needs
* Created wireframes, mockups, and interaction specifications
* Designed user interface for internal and external applications
* Ensured usability during technical implementation

**J.P. Morgan**,Private Banking

User Interface Designer (3/10 – 12/11), New York, NY

Designed user experience for multiple applications across large private banking portal:

* Created mockups, wireframes, and prototypes
* Determined screen flow, navigation, and labeling
* Designed screen interactions and behaviors
* Collaborated with stakeholders to define requirements
* Identified user workflows and interactions
* Established and documented UI standards and styles
* Wrote user help documentation

**Ivy Asset Management LLC, The Bank of New York Mellon**

User Interface Designer / Information Architect (1/06 – 12/09), Jericho, NY

Designed and implemented user interface strategy for hedge fund management system:

* Created user interface including screens, interaction elements, and visual assets
* Developed design mockups in Visio and Photoshop
* Provided developers with HTML and CSS
* Established navigation, labeling, language and style conventions
* Participated in business requirements definition process
* Translated requirements into user interface
* Collaborated with business analysts, stakeholders, and developers to integrate requirements with usability and technical needs
* Reviewed business requirement and functional specification documents
* Designed print reports
* Wrote style guides, screen content, and system user messages
* Edited help documentation
* Assisted QA team with front-end testing

**Bank of America,** Interaction Engineering

Information Architect (4/05 – 12/05), New York, NY

* Collaborated with users to integrate usability with application development
* Reviewed and interpreted business and functional requirements
* Created wireframes, site maps, and interaction specifications

**Ivy Asset Management Corp**

User Interface Designer (2/04 – 3/05) – [See above]

**Deutsche Bank / Bankers Trust**

Site Designer / Content Architect (5/03 – 7/03, 4/99 – 5/02), New York, NY

* Designed web sites to incorporate branding goals and meet corporate guidelines
* Interviewed clients and stakeholders to identify site goals and user needs
* HTML/CSS coding, created sites in Photoshop, sitemaps and wireframes in Visio
* Worked with technical teams to detail UI and functional specifications

**Ceteris Inc.**

Web Design Consultant (1999 – 2013), New York, NY

* Information architecture, user interface design, content development, web design

**TECHNOLOGIES**

**Design:** Figma, Axure, InVision, InDesign, Photoshop, Illustrator, Visio, Acrobat, PowerPoint

**Coding:** HTML, CSS, Dreamweaver, basic knowledge of JavaScript

**Development:** Jira, SharePoint, Quality Center

**Other Experience** (Publishing, Marketing)

The Lancet Reed-Elsevier, Scientific American Medicine, Scientific American Magazine, NY, NY

**Education**

School of Visual Arts, Graphic Design; Brooklyn College, English; New York University, Direct Marketing

**Pro Bono** (Web Site Design and Management)

[Independence Plaza Tenants Association](http://ipnta.org) • [Mitchell-Lama Residents Coalition](http://mitchell-lama.org)

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