

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 User Experience Designer (10/20-2/24)

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**®, 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

Collaborated with senior executives and key business stakeholders to design concepts and experiences that align with client needs and increase profitability for institutional brokerage applications:

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

Fidelity Investments, Securities Finance

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

- Created wireframes, mockups, and interaction specifications for securities lending applications

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

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

TECHNOLOGIES

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

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

Development: Jira, SharePoint, Angular, Quality Center

Prior Experience

Bank of America, Information Architect, New York, NY

Deutsche Bank, Site Designer/Content Architect, New York, NY

The Lancet Reed-Elsevier, Scientific American, New York, NY

Education

School of Visual Arts, Graphic Design; Brooklyn College, English

Pro Bono Web Site Design and Management

Independence Plaza Tenants Association • Mitchell-Lama Residents Coalition

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