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Deloitte Advisory Principal | Financial Services

Courtney is a Principal in Deloitte & Touche LLP focused on providing banking and securities clients advisory services in the risk and regulatory space. He has supported several of the firm's largest clients, leading complex engagements for various functions including Risk, Treasury, Finance and Technology. He has over 17 years of experience in the financial services industry focused on regulatory reform, credit risk management and capital management. Prior to joining Deloitte he spent several years in the financial services industry most recently at JPMorgan in the Credit Portfolio Management Group and prior to that Merrill Lynch in the Finance and Treasury functions.

Courtney has led engagements relating to large scale regulatory initiatives, vendor selection and assessments, data validation and management processes, credit and operational risk assessments and various other transformative initiatives. In addition he has advised clients on additional areas such as capital optimization, regulatory strategy, technology design and implementation, operational streamlining and new product/process development.

Selected Experience

- Led engagement to perform data analytics on FR Y14 submissions for a CCAR bank to support ongoing reporting review and assurance activities
- Led effort to establish and execute capital optimization program at large US institution resulting in the identification of numerous capital reduction opportunities materially impacting capital ratios
- Lead multiyear effort supporting major US institution in their end to end implementation of Basel requirements including buildout of calculation and reporting systems
- Led engagement to assist in the refinement of institution's capital plan and associated processes
- For a global banking firm with large U.S footprint, assisted bank in defining Basel requirements, legal entity approaches, and developing implementation plans to achieve regulatory compliance

Education / Professional Affiliations / Certifications

- Chartered Financial Analyst
- State University of New York at Buffalo
 - BS – Business Management (Finance/Marketing)
 - BA - Economics