

Tucker Lieberman

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Ascensus (ascensus.com)

Newton, Mass., USA

Oct. 2006 – Oct. 2017

For 11 years, I worked on web-based products that help Americans save for college, charity, and retirement in tax-advantaged investments. The company builds online features and recordkeeping.

Product Manager, User Experience

Jan. 2015 – Oct. 2017

Worked with company leaders, relationship managers, business analysts, developers, testers, and marketers to make high-level decisions about the design of key products.

- In 2017, I designed the interface for an auto-enrollment retirement savings program for the State of Oregon, the first such program in the US. **Agile methodology.**
- In 2015 and 2016, I redesigned existing features and designed innovative new features for 529 college savings plans according to a “responsive” model that adjusts to the size of the user’s screen, allowing customers to log in from their mobile devices.
- Using a content management system (CMS), I updated public websites for clients.

Testing Analyst, User Acceptance Testing

July 2008 – Jan. 2015

Developed strategies and performed tests to ensure error-free releases.

Testing Analyst - Responsibilities

- Managed team’s monthly record of testing status and stakeholder approval (“signoff”)
- Led team’s review of quarterly statements and year-end tax forms
 - Traveled to the printer to quality-check on-site
- Performed front-end quality assurance and usability testing, focusing on:
 - Client service representative’s application and investor’s login experience
 - Downloadable and printed material including personalized confirmations
- Used in-house systems for ticketing and defect tracking (identifying, logging, and re-testing at least 12 bugs in an average month, plus re-testing many logged by others)
- Verified back-end data integrity with Tech
- Wrote and ran SQL queries to find data for test cases
- Mentored junior employees as they navigated rapidly changing Tech builds

Testing Analyst - Project highlights

- Led testing of plan rebranding while moving nearly \$1 billion to a new fund manager
- Took sole responsibility for usability testing of the elimination of an old platform
- Participated in fund openings, mergers and closures, including automatic allocation adjustments, and incoming conversion of over a dozen 529 plans from multiple states
- Supported the launch of incentive programs under State Treasury rules
- Verified recurring transactions (dollar-cost averaging, rebalances, brand loyalty rewards)
- Calculated changes to pro-rated allocations and fee assessment
- Tracked electronic gifts from third-party bank and investment accounts
- Tested newly optimized page load time after archiving old data elsewhere in the database
- Modified case logging, information displays, and approvals to empower representatives
- Collaborated in the redesign, enhancement, and maintenance of a philanthropy vehicle

Client Service Representative, Client Services Oct. 2006 – July 2008

- Data processed clients’ written requests, quality-checked the team’s processing, and approved financial transactions after the workday ended
- Supported new hires as the sole experienced employee on “second shift”

Awards and leadership development

- 2014: Ascensus Cornerstone Award nomination
- 2013: “Think Tank” Award for proposing an efficiency improvement
- 2013: “Thank U” Award for assistance closing out a competitor’s assets
- 2013: By invitation of senior management, helped plan design strategy for mobile devices
- 2011, 2013: Management and leadership training

UX Coursework & Certificates

Boston University, College of Communication, Boston, Mass.	June 2020
• “Data+Narrative”	
International Software Quality Institute (iSQI)	May 2019
• Certified Professional, Usability and UX – Foundation (CPUX-F)	
Bentley University, User Experience Center, Waltham, Mass.	2015 – 2016
• Information Architecture in Web Design	• Designing the UX
• Online UX Research Tools	• Content Strategy

Conference Attendance

UX Professionals’ Association (UXPA)	Boston, Mass.	2015, 2016, 2019
Bentley University “Face of Finance”	New York, N.Y.	2018
World Information Architecture Day	Boston, Mass.	2017

Licensing

FINRA Series 7: General Securities Representative	May 2012
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Life Coach Training

Easton Mountain, Greenwich, N.Y.	
• Alumni assistant to the new class of life coaches	March 2018
• Two-week intensive in-residence program	April and Oct. 2016

Spanish Language Study

“Español colombiano en casa”	2018 – present
<i>private instruction with Félix González Montejo</i>	
“Curso de redacción para no periodistas”	October 2019
<i>taught by Carlos Solano at El Tiempo, Bogotá</i>	

Education

M.S. Journalism (International and Security Issues)

Boston University	Boston, Mass.	January 2005
<i>U.S. Army civilian employee (intern)</i>	<i>Fort Knox, Ky.</i>	<i>July/Aug. 2004</i>
<i>Produced an internal newspaper for the summer ROTC program, Leaders Training Corps.</i>		

B.A. Philosophy

Brown University	Providence, R.I.	May 2002
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