

## **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, '16, '19 ('20, virtual)
Anti-racist Design Thinking	Creative Reaction Lab	2020 (virtual)
"Sense & Respond" (with Josh Seiden)	UXPA	2020 (virtual)
Bentley University "Face of Finance"	New York, N.Y.	2018
World Information Architecture Day	Boston, Mass.	2017 ('21, virtual)

## **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**

<b>M.S. Journalism (International and Security Issues)</b>		
<b>Boston University</b>	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>B.A. Philosophy</b>		
<b>Brown University</b>	Providence, R.I.	May 2002