

Jordan Jhabvala

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SUMMARY

Strategic, results-oriented leader with experience in product management, client experience, and strategy roles. Lead cross-functional teams to bring innovative solutions to market while focused on driving team and firm results.

SKILLS

Leadership and people management | Product management | Strategic planning | Business strategy | Executive communication | Business development | Customer focus & client experience | Project management

EXPERIENCE

Charles Schwab & Co, Inc., Denver, CO

March 2016 – January 2024

Director, Product Management & Client Experience

September 2021 – January 2024

- Responsible for a \$315M revenue book of business for Schwab's Income Solutions product offering.
- Managed 10 product managers to optimize and curate the third-party income solutions product offering.
- Led creative development with UX partners to incorporate client feedback into redesigns of the Schwab website.
- Served as the cross-functional lead to develop a strategy and multi-year roadmap for income solutions products.
- Won the 2020 Schwab CEO Award for outstanding service and impact to Fixed Income, Insurance and Annuities.

Director, Product Management

March 2018 - September 2021

- Managed product managers to optimize and curate the 3rd-party insurance product offering for clients.
- Led the strategy implementation of a third-party insurance brokerage firm to best serve Schwab clients.
- Won 2019 Schwab Community Ambassador Award for outstanding community service in the Denver metro area.

Senior Manager, Business Strategy

March 2016 - March 2018

- Created a multi-channel paperless strategy that helped save Schwab over \$2.4M in paper and postage costs.
- Reduced equity trade commission pricing for clients from \$12.99 per trade down to \$0, the first in the industry.
- Won the 2017 Schwab Challenger Award for driving digital adoption through paperless initiatives.

Perficient, Inc., Denver, CO

July 2014 - March 2016

Sr. Management Consultant

- Led process improvement effort to digitize the customer order intake process at ACME Steel Manufacturing.
- Developed the hub and spoke model for Delta Dental of Colorado to deliver dental care to Medicaid patients.

Under Armour, Baltimore, MD

June 2013 - August 2013

Financial Planning & Analysis MBA Intern

- Built the use case and discounted cash flow model to validate entering the Women's Golf & Tennis Apparel market.

Memphis Grizzlies, Memphis, TN

April 2013 - June 2013

Basketball Operations MBA Intern

- Responsible for college and international amateur player evaluation and analysis for the NBA Draft.

Standard & Poor's, New York, NY

August 2005 - August 2012

Director, Product Management

January 2007 - August 2012

- Architected the global sales and new client development strategy for the Real-Time equity monitoring application.
- Led the team that increased sales revenue of the Real-Time application from \$550,000 in 2008 to \$3.1 million.

Account Development Manager

August 2005 - January 2007

EDUCATION

Master of Business Administration (MBA), Carnegie Mellon University, Tepper School of Business, Pittsburgh, PA
Bachelor of Arts (B.A.) – Business Economics, Brown University, Providence, RI
Bachelor of Arts (B.A.) – Public & Private Sector Organizations, Brown University, Providence, RI
Men’s Varsity Basketball Player, Brown University, Providence, RI

LICENSES & CERTIFICATIONS

Series 7 (General Securities Representative), FINRA
Project Management Professional (PMP), Project Management Institute (PMI)

COMMUNITY INVOLVEMENT

Boys & Girls Clubs of Metro Denver: Chairman, Associate Board of Directors
Schwab Community Ambassadors: Boys & Girls Clubs, Children’s Hospital Colorado
Chauncey Billups Elite Basketball Academy: Program Player Development Coach