

## TIMOTHY O'BRIEN



Tim is Envestnet's Managing Director of Information Security and Information Technology. He is a senior executive with over 20 years' experience in cybersecurity and Information Technology. Chief Information Security Officer for several companies. He has exceptional knowledge and experience in cloud technologies and application platforms that provide for a unique cybersecurity perspective. Tim has held various leadership positions in start-ups as well as multibillion-dollar companies, including as a Security and Technology leader for a company IPO in 2014.

Tim's track record includes:

- After being acquired by Envestnet in 2015, promoted to Managing Director of Cloud Services and Information Security.
- Developed and implemented cybersecurity program based on NIST framework: drove adoption of security across multiple business units and cloud applications and safeguarded company assets that consist of investor and consumer financial information, including NPPI, and platforms generating over \$900M in revenue.
- Established the first Board-level committee to oversee cybersecurity for company. Report quarterly to the Board on cybersecurity status and risks.
- Championed and gained management buy-in to establish a Security Operations Center to monitor all platforms and company assets – domestic and international.
- Established operating procedures and controls to meet FFIEC regulatory requirements for all bank consumer financial services (B2B2C).
- Developed risk-based approach to security governance and drove implementation to all business units.
- Established cybersecurity due diligence program to evaluate potential acquisitions. The program includes a risk assessment, pre-acquisition audit, and post-acquisition steps to integrate new entity into companies' cybersecurity program.
- As business expanded internationally, developed country-specific programs to address security, privacy and regulatory requirements for revenue generating products and services.
- As CISO, represented company in M&A transaction in 2015 with Envestnet Inc., equity valuation of \$656M.

Tim's previous role was as Managing Director, Cloud Services and Operations, where he:

- Initiated, championed, gained C-level approval, and led technology transformation of financial services and applications to cloud platforms.
- Led teams of up to 350 and managed annual budgets of some \$65 million.
- Leveraged technology to automate management of infrastructure and application services that allowed company to scale business and meet EBITDA targets.