



## Caren Roseman

Caren Roseman is a financial services executive with broad experience in strategy, business expansion, operations and technology, and talent management. With 35+ years in the industry, she has extensive operating experience and has consistently been an important contributor in growing profitable trading businesses. She has been responsible for developing and executing new business strategies that generated incremental revenue, as well as the transformation of existing businesses that resulted in cost savings and positive impact on profits. Roseman excels at managing complex problems and has a strong reputation for building diverse professional teams.

Roseman spent seven years at Citigroup. From 2012 through 2017, she served as Managing Director and Chief Operating Officer for the CEO of North America. Caren executed the strategy for the identification of revenue opportunities and improved coordination across business lines, resulting in improved profitability in North America, which contributes ~50% of Citigroup's worldwide revenues.

From 2010 through 2012, after the devastation of the financial crisis, Roseman joined Citi as a consultant and worked with the senior management team in Global Banking, leading the execution of a revamped organizational strategy, acquiring and onboarding senior talent (50+ Managing Directors globally) for the Investment and Corporate Bank. This initiative required approval from Citigroup's Board and results were monitored quarterly. The results were improvement in profitability and industry rankings (from #11 to top 5 in M&A league tables).

Prior to Citigroup, Roseman was a Managing Director at Morgan Stanley, where she spent 25+ years. Roseman joined Morgan Stanley in 1983, when the Firm was expanding their global sales and trading businesses. Earlier in her career at MS, she developed and implemented the operations and technology infrastructure for the Foreign Exchange and International Equity businesses, leading a team of 100+ professionals globally. At a time of rapid growth, Roseman worked with the Business Heads to develop a roadmap and prioritize the most impactful opportunities for ROI, at the same time ensuring sound governance and risk management of the Business.

From 1996 through 2009, Roseman was a member of the senior management team in the Foreign Exchange business. She served in various roles, including the Head of Sales in North America. The FX business generated revenues of \$300 - \$400 million annually for the Firm. As a proven change agent, in the early 2000s, Roseman led the digital transformation of the traditional FX business. Roseman restructured the teams, simplified workflow, and improved technology, resulting in measurable cost efficiencies. Additionally, she led the development and execution of a new business – the e-FX business – which grew from \$40M-\$50M in 2007 to \$200M today.

Roseman served on the Board of Trustees for Jacob's Pillow and chaired the HR Committee from 2019-2021, The organization's mission is to support dance creation, presentation, education, and preservation. Roseman also volunteers at the Medicare Rights Center in New York City. MRC is a national, nonprofit consumer service organization that works to ensure access to affordable healthcare for adults and people with disabilities. Roseman received an MBA in Finance from Pace University and a BS in Liberal Arts from New York University. She currently resides in New York.