

MACKENZIE LEE, PMP, MBA

End-to-End Project & Program Delivery | Financial Services

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PROFILE

Enterprise Project and Program Manager (PMP, MBA) with 17+ years leading complex, high-stakes technology and business transformations across Canada's financial services sector. Proven track record owning complete delivery lifecycles-including 11 years at CIBC Wealth Management-spanning multi-million-dollar platform migrations, regulatory compliance, and vendor partnerships. Applies agentic AI and modern tooling to accelerate delivery timelines and optimize project execution.

CAREER HIGHLIGHTS

- **Led \$10B+ AUM mutual fund platform migration (Unitrax → iFast)** - delivered end-to-end in under two years, on budget, chairing executive steering committees with a 100+ person team and budgets to \$5M+
- **Established CIBC's first-ever external bare trustee partnership with Questrade**, expanding institutional service offerings
- **Unlocked CIBC Wealth Management as approved investment manager for all EY Canada partners & managers** - opening a high-value acquisition channel spanning thousands of professionals
- **Executed enterprise-wide RRIF legislative response** - formed cross-enterprise teams and delivered system, process, and client communication changes in under 6 months

WORK EXPERIENCE

Zero Trust Technologies - Cybersecurity & IoT Security R&D Consultancy Project Lead & Delivery Manager

Nov 2023 - Present

Led a cybersecurity and IoT security R&D consultancy, applying the same project rigor - scoping, technical risk management, vendor/reference evaluation, and delivery - used on enterprise financial-services initiatives to real-world security research, including network security, wireless threat detection, and vulnerability testing.

- **Cellular Signal Mapping & Anomaly Detection Tool** - led design and delivery of a field-tested system to flag rogue/IMSI-catcher (StingRay-type) base stations across a metro area.
- **Wireless Security Auditing Toolkit** - Wireless Security Auditing Toolkit - directed the setup and deployment of automated wireless security auditing tools to evaluate network vulnerabilities in controlled environments.
- **Wireless Motion-Sensing System (WiFi CSI)** - scoped and delivered a working prototype after identifying a popular open-source reference project relied on synthetic rather than live data.
- **Applied agentic AI coding tools (Claude Code, GitHub Copilot) throughout** to accelerate build and iteration cycles across all R&D initiatives, directly applying AI-augmented delivery practice to real project work.
- **Set up and managed project tracking in Jira and Confluence**, mirroring enterprise PM tooling in an independent setting.
- **Maintained active professional development** throughout, completing PMI's Generative AI for Project Managers program and Agile/Scrum coursework; PMP in good standing

CIBC - Wealth Management Project Manager

Sept 2012 - Nov 2023

Performed the role of leading business project and program manager on multiple projects within CIBC Wealth and Asset Management, responsible for planning, executing, and controlling cross-enterprise, pan-wealth and single line of business initiatives.

Managed medium to large teams of between 10 and 100+ people, to achieve project objectives and business priorities with budgets ranging from \$100k to \$5M+. Collaborated with business, technology, operational partners, and 3rd party vendors to implement new systems, and changes to existing systems within the CIBC project delivery framework. Led executive updates and project teams, delegating work and managing risk until completion.

Key Projects

Renaissance Mutual Funds -Complete Book of Record System Conversion

- Performed role of lead business program manager on a complete migration from Unitrax (L&T Infotech) to the iFast (IFDS) platform for all 3rd party mutual funds (>\$10 billion AUM)

- Chaired executive steering committees and led a 100+ cross-functional team to execute the end-to-end migration/modernization of mutual fund book-of-record, servicing, and digital portal infrastructure.
- The program re-built ~20 internal/external system interfaces including client statements and tax slips, 200+ reports across many diverse business functional groups, and migration and reconciliation of billions of client and mutual fund product data records
- The project was delivered within budget, end-to-end in less than two years

Questrade Custodial Services Implementation

- Led cross-functional implementation of CIBC Trust as custodian for Questrade's brokerage accounts, establishing the first external bare trustee services partnership
- Collaborated directly with Questrade analysts to develop system requirements and resolve technical specifications, while coordinating across capital markets, bare trustee services, legal, and operational risk teams to deploy back-end systems, reporting infrastructure, and negotiating contracts/SLAs
- Successfully delivered innovative custodial solution, expanding CIBC's service offerings

Data Hub and Business Intelligence Dashboard

- Managed the planning and ongoing execution phase of an integrated data hub and business intelligence dashboard, including implementation of a back-end risk calculation engine for all mutual funds and institutional portfolios using Tableau as a proof-of-concept
- Authored the executive business case and future-state information architecture for a full enterprise BI data solution, securing organizational alignment and sponsorship to carry the initiative forward to the next delivery phase

EY Employee Portfolio Compliance Data Feed

- Resolved a complex regulatory compliance barrier by implementing an automated nightly data feed transmitting CIBC client portfolio holdings to EY for compliance monitoring - enabling all EY managers and partners across Canada to invest with CIBC Wealth Management for the first time
- Worked directly with CIBC and EY technical teams to define precise data specifications, layout, and timing - unlocking a high-value client acquisition channel spanning thousands of EY professionals, firm-wide
- Positioned CIBC Wealth Management as the approved investment manager for EY's Canadian workforce, directly expanding the firm's high-net-worth client acquisition pipeline

Additional Notable Projects

- RRIF Minimum Payment Changes - Executed enterprise-wide RRIF changes in response to unexpected legislation, forming cross-enterprise project teams and delivering system/process changes and client communications within <6 months
- BC/SK Provincial RESP Grants - Managed rapid development team of ~30 SMEs and stakeholders to implement one-bank approach providing access to BC and SK RESP grants
- MFDA Compliance - Managed series of 25 compliance-related changes to systems, processes, and client documentation for CIBC's proprietary mutual funds, securing scarce company-wide resources

Digital Marketing & Health Communications Agency (Klick Health)

Oct 2010 - Sep 2012

Project Manager

Managed multi-role teams to build website/application development projects and marketing campaigns for external clients, with budgets between \$10k-\$500k. Responsible for planning, project delivery, budget, time, scope, and reporting.

- Notable project deliveries include a project management information system for Rogers, an online corporate media sharing site (RTube) for Rogers, and in-store digital kiosks for Canadian Tire
- Managed web and marketing campaigns for pharmaceutical clients including Alesse.ca, Champix, Pfizer, and many others

Globe and Mail (GlobeInvestor / GlobeFund)

Dec 2007 - Aug 2010

Project Manager / Systems Integrator

Managed multiple concurrent client projects varying between \$20k to \$500k, leveraging GlobeInvestor data to deliver real-time market data APIs, portfolio analytics, and institutional trading/wealth tools for 20+ major financial institutions. Played a central role in internal product innovation and R&D. Managed scrum teams (Scrum Master) including daily scrums to deliver on product goals, sprints, sprint review, product backlogs, scrum artifacts.

- Portfolio Builder/Asset Allocation tools outputting Investment Policy Statements
- Live Market Performance web APIs
- Marketing/regulatory Mutual Fund Fact sheets - a first in Canada

- Clients included BMO Guardian, GP Wealth, Dynamic Funds, AGF, HSBC, Macquarie/Blackmont, Manulife, and many others

Royal Bank of Canada (Online Banking / Dominion Securities)

Sept 2006 - Dec 2007

Business Systems Analyst

Lead business systems analyst on the Dominion Securities Online website build and launch. Wrote requirement specifications, data models, processes, test plans, test cases, and performed business acceptance testing. Quality and timely delivery praised by sponsor.

EDUCATION

Master of Business Administration (MBA)

2019 - 2022

Australian Institute of Business | Specialization: Project Management

Comprehensive education in business management, leadership, finance, investment management, marketing.

Bachelor of Commerce - Information Technology Management

2001 - 2006

Toronto Metropolitan University (Ryerson University) | Major: Knowledge and Data Management

Program combined conventional business curriculum alongside a strong foundation in information systems for modern enterprise.

CERTIFICATIONS

Project Management Professional (PMP)

2010 – Present

Project Management Institute | PMI Member ID: 1808011

SKILLS

Project / Program Management: Project and Program Management, Project Planning & Strategy, Team Leadership (up to 100+ people), Chair - Executive Steering Committee, Project Budget/Time Estimation, Business Case Creation, Executive Project Funding Requests, Risk Management, Quality Management, Project Change Control, Project Budget & Financial Reporting, People Change Management, Project Benefits Realization, Financial Forecasting

Technical: Generative AI, AI Oversight, AI-Human Collaboration, AI Prompt Engineering, Agentic AI, IoT Development (ESP32), RF/SDR Signal Analysis, Web Application Development, Business Intelligence, SQL/Relational Databases, Data Warehouses/Big Data, Information Architecture, Process Analysis & Design, Financial Recordkeeping Systems, Back Office Operation Systems, MS Project/Gantt Charts, Enterprise PMO Reporting, Tableau, Planview, Jira, Confluence

Business: Capital Markets, Retail Banking, Wealth Platforms, Institutional Custody & Asset Management, Books of Record, Regulatory & Legislative Compliance, GenAI Integration & Governance, Negotiation/Influence, Financial Wealth Management, Brokerage Applications, Back Office Operations, Digital Marketing, Business Analysis, Data Ethics

Methodologies: Waterfall / Iterative / Agile / Scrum, Critical Path Management, PMI PMBOK, Generative AI for Project Managers