

MANN PATEL

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PROFESSIONAL SUMMARY

Rutgers Finance Graduate with hands-on experience advising top-tier financial institutions on digital transformation, Salesforce pipeline strategy, and workflow optimization at scale. Proven ability to support millions in annual deal volume, manage hundreds of opportunities, and serve high-net-worth clients. Wealth management grounding from Corient. Combines a strong analytical foundation with a growing focus on leveraging AI tools to elevate business performance, automate strategic processes, and drive measurable results.

WORK EXPERIENCE

Accenture LLP, Morristown, NJ

May 2023–Feb 2026

Business Consultant

- Owned the deal workflow for a book of financial institutions (Mizuho, SMBC, MUFG, Dai-ichi Life): 200+ concurrent opportunities against \$50M+ in annual volume, as the single point between the client and delivery.
- Drove platform adoption past launch for Morgan Stanley's Home Loans division: wrote the user stories, ran the sprint cadence, and reported business-unit value on rollout so the people funding it could see what had changed.
- Delivered as subject matter expert and primary liaison between clients, business users, and cross-functional teams, gathering intel on key initiatives to support account expansion.
- Redesigned how work entered and moved through the delivery queue across concurrent engagements, cutting backlog 30% in six months and raising sprint velocity.

Corient, Morristown, NJ

Mar 2022–Jul 2022

Wealth Management Intern

- Supported 20+ high-net-worth clients (\$5M+ portfolios) across retirement, tax, investment, and estate strategies while conducting due diligence on 90+ investment funds to evaluate prospectus alignment, benchmark performance, and risk parameters.
- Led a Capstone advisory engagement applying financial planning principles to increase portfolio efficiency and generate \$100K+ in projected tax savings.

AI SYSTEMS & PRODUCT FLUENCY

- Build and run a personal operations system daily: 8 domain agents on scheduled loops over 1,400+ files, scripts and records, with 86 skills (51 custom) and a meta-dispatcher. The system autonomously reconciles trades, runs web automation, and ships code.
- Ship AI workflows end to end and drive personal adoption. Workflows return reconciled records, self-rendered charts, graded assessments, PDF reporting, on routined schedules.
- Engineer pre-action gates that catch classes of automation error before execution (cost and blast radius, irreversible deletion, identifier verification, negative-result verification). An operational risk control layer applied to AI output. Each gate originated as a result of AI hallucinations
- Build products on the stack: [jot](#), a capture app where the prompt is the schema and paragraph-level timestamps make the pause between thoughts measurable. [Fablewick](#), an open-source AI storybook library on a provider-agnostic model layer.
- Ship programmatic document pipelines (ReportLab + matplotlib, Playwright HTML to PDF) that reconcile to a source export before layout.

EDUCATION

Rutgers University, **Rutgers Business School** – New Brunswick, NJ

May 2023

Bachelor's in Science, Finance | Honors: Dean's List, 2019-2023

3.81 GPA

LEADERSHIP/CAMPUS INVOLVEMENT

Rutgers Future Scholars Dream Team, New Brunswick, NJ

Apr 2014–Present

Ambassador Alumni, Treasurer, Director of Community Service

- Managed treasury operations for 10+ events while building an interactive mentoring environment for 2,000 first-generation and financially disadvantaged middle and high school students across Rutgers University.

SKILLS & INTERESTS

- **Technical:** Agentic AI Stack (Claude / Claude Code, MCP connectors, scheduled agents, Cursor, n8n-class automation), AI Strategy & Workflow Orchestration, Audit & Discovery, Salesforce, Python, SQL, Playwright
- **Interests:** Basketball, Running, Meditation