Robert Perry Morris

Turning data into strategy, chaos into control.

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$29M
ANNUAL FX SETTLEMENT SAVINGS

$2.9M
PROACTIVE CREDIT EXPOSURE MITIGATED

$10B
BALANCE SHEET LIQUIDITY OPTIMIZED

FUNCTION
Portfolio Management

EMPLOYER
KeyBank

PRIOR
Citibank · 13 yrs

FOCUS
Risk · Treasury · Analytics

I'm the connective fiber between Tech, People Resources, Product, and Finance, all wrapped in a banking ecosystem. Thirteen years at **Citi** across FX, liquidity, equity derivatives, and risk gave me the infrastructure fluency to see how it all fits together. Now at **KeyBank**, I apply that to portfolio management and credit risk strategy.

My edge is finding the problem nobody's named yet. A predictive model that flags credit risk before customers max out. A SWIFT migration that saves $29M annually.

> I build scalable solutions, and I make sure they align with real business needs.

2012 – 2024
citibank
Analyst through VP · 13 Years · FX, Equity Derivatives, Liquidity, Risk & Treasury

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2025 – Present
KeyBank
Portfolio Management · Business Banking Risk Strategy · Predictive Modeling

SKILLS

Regulatory & Risk
CCAR · 2052a · LCR / NSFR · ALCO · Liquidity Risk · P&L / Product Control

Markets & Operations
FX Settlements · CLS Clearing · SWIFT · Nostro Funding · Equity Derivatives

Tools & Technology
Power BI · Tableau · VBA · SQL · Excel · KNIME · Gen AI · Confluence · Jira · Salesforce

Strategic
Cash Forecasting · Stress Testing · Process Automation · Cross-Functional Leadership · Regulatory Reporting · Stakeholder Management

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Portfolio Management · Risk Strategy · Buffalo, NY

LEADERSHIP

01 **Citi Buffalo Pride**
Co-founded the ERG, growing it to 300+ active members.

02 **AI Accelerator**
Advocate for integrating generative AI into live banking workflows.

03 **Productivity Workshops**
Facilitated 25+ cross-functional workshops across Citi operations.

EXPERIENCE

Portfolio Management
2025 – Present

KeyBank

Managing risk strategy, automation, and systems design across the business banking portfolio. Built predictive models to proactively close or reduce credit lines before high-risk customers reach max utilization, actively mitigating millions in daily exposure.

Risk Strategy · Predictive Modeling · Salesforce

VP, Non-Trading Market Risk Solutions
2024

Citibank

Operated as Chief of Staff, driving cross-functional coordination across Treasury, Finance, Risk, and Tech. Spearheaded the Treasury Management Notebook in Confluence, was among the first in the division to operationalize generative AI in live banking workflows, and automated cash rebalancing in forecasting platforms.

Treasury · GenAI · CCAR

VP, Liquidity Management
2021

Citibank

Key player in Citi's banking crisis response. Executed massive balance sheet optimization initiatives that improved liquidity capture across targeted sub-entities, successfully optimizing regulatory ratios and cementing $10B in improved liquidity positioning.

LCR / NSFR · Balance Sheet Optimization · Tableau

AVP, FX Processing & Equity Derivatives
2012–2021

Citibank

Led two high-throughput functions across Citibank Buffalo. In FX Trade Processing, managed Interbank and Corporate settlements teams (25 staff) through high-value global flows, driving a SWIFT migration that eliminated manual mapping layers and delivered $29M in annual savings. In Equity Derivatives Product Control, managed daily P&L for complex index and sector trades, overseeing a team of 6 through COVID-19 volatility, with dashboards built in PowerBI and KNIME for proactive risk identification.

FX · CLS · SWIFT · P&L · Derivatives · KNIME · Power BI · Team Leadership