

Peter Morales

Resilient, energetic, results oriented, technology leader with deep experience in strategic business aligned product delivery in the financial services, education, healthcare and defense communities. Expert in the strategic use of Agentic AI for enterprise data and workflow effectiveness. Proven record of success in developing secure and innovative application of fault tolerant technology platforms, fostering collaborative (win-win) relationships with stakeholders, streamlining IT DevOps operations, and driving cadence on programs to deliver successful organizational transformations (from startups, to midsize and enterprise scale).

QUALIFICATION HIGHLIGHTS

- Executive technology and transformation leader across financial services, education, healthcare and defense
- Agentic AI architect and author; 6 pending/provisional AI patents
- CIO/CISO/COO leadership spanning cyber, cloud, data, PMO and operations
- NYU adjunct faculty and board/advisory leader; IMF Cyber Risk Supervision, and Certified Scrum Master

ACHIEVEMENTS

- On the board of directors of the Cyber AI Startup London, Miami, and NY (acting as COO/CTO), and Epic Education Foundation.
- On the board of directors for the Institute for Study Abroad (IFSA). Chair of the Executive Advisory Group consisting of a team of executives, researchers and educators in the development of an Innovation Laboratory in partnership with faculty at the University of Prague.
- Previously, worked as the CIO at the engineering school for NYU and at the American and New York Stock Exchanges.

- Developed an experimental diagnostic system for a Pediatric Neurologist at North Shore University Hospital.
- Author of an Agentic AI framework implemented to drive process cadence, velocity, capacity and quality.

EXPERIENCE

CyberAI / Acting Chief Operating Officer - Chief Technology Officer

APRIL 2025 - PRESENT, LONDON, MIAMI, NY

- Leadership of a startup in the implementation of an AI Native Cyber Security appliance (including 6 provisional patents under my name) to create a reusable, scaleable agentic infrastructure for cyber defense.
- Created reference architecture and proof of concept, led RFP and vendor onboarding.
- Managed remote teams and key partnerships. Developed an agentic AI beta (Sentinel 3.0) cyber security platform using NVIDIA DGX Spark, Ollama, n8n, Grist, Wazuh.

Square One / VP of Operations, Chief Operating Officer

APRIL 2025 - PRESENT, SPRINGFIELD, MA

- Day to day technology operations, construction, vendor management, project management, budget controls.
- Developed an Agentic AI native Project Management workflow and analytics platform with cadence, velocity and quality KPI/OKR metrics.
- Developed an agentic AI rubric driven platform for Case Management of real-time workflow integration into databases, metrics dashboards, email/calendars, document management, and regulatory compliance reporting.
- Wrote a textbook for the development of Agentic AI as used in cyber security, Case and Project Management.

Country Bank / Senior VP - Chief Innovation and Technology Officer, CIO/CISO

2021 - APRIL 2025

- CIO, Enterprise responsibility for the definition, execution and governance of a holistic multi-year strategic plan for a digital transformation of key Bank technologies.
- CISO, responsibility for all cyber-security strategy, NOC/SOC, audits, compliance. Leadership of a defense in depth strategy, using security everywhere (zero trust), intrusion detection/prevention, telemetry/instrumentation, SIEM, data loss prevention, education/training, threat hunting / analytics, forensics with external expert partnerships (including a former NYC Police/FBI captain). Development and leadership of the Bank Infosec Threat Hunting team.

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- Research leadership in the safe and reliable use of generative AI (LLMs, prompt engineering, workflow automation, agents) for supply chain analytics and analysis of complex business processes. Implemented use of an AI Agent based process to analyze complex invoices leading to yearly savings in the mid six figures using Chat GPT 4o, R, Python (also tested: Llama, Claude Sonnet, Gemini). Used AI/LLM to analyze complex contracts.
- Responsible for key partnerships and contracts. Principal negotiator of contracts resulting in 7 figure savings while delivering substantially increased value, efficiency and agility.
- Partnered with senior division heads to develop a cohesive digital technology strategy using a rubric (my published methodology - Rational Choices) to balance strategic value, enterprise risk and economic objectives. Translated results into trackable project execution workflow (Rolling Wave Plan with Phases & Gates across all Divisions).
- Certified for Cyber Risk Supervision through the International Monetary Fund.
- Responsible for Bank incident management, disaster recovery, business continuity (including direct lead in the development of a real-time collaboration tool to coordinate event identification/analysis/containment/eradication/recovery).
- Recruit and develop staff including 4 Vice Presidents (Information Security, Operations, PMO, Business Process Optimization).
- Responsible for Data Center, Hosted and Cloud technology strategy and execution with specific focus on security, disaster recovery, incident / ransomware response.
- Lead in response to audits (internal/external, FDIC, State Division of Banking, penetration tests, etc.).
- Lead in the implementation of a Bank wide PMO with a state of the art process to prioritize work (do what matters most - first) and to create a single source of truth for all Bank initiatives in order to balance objectives against capacity. Lead the organizational transition to this framework with hybrid training for the entire Bank workforce.
- Implemented a legal framework to manage vendors and extend our capacity with external strong SOC 2 compliant partners. Developed threat intelligence process for 3rd, 4th party cyber profiles.
- Lead in efforts to redesign and improve our Data Center and Disaster Recovery facilities and infrastructure including upgrades of our power, generators, networking and security systems.
- Implemented a microservices integration (PortX) platform for on-prem and cloud service oriented orchestration/integration architecture (SOA, API connectors, middle-ware services).
- Lead the Bank's governance process for senior management, Board of Directors, resulting in the first ever 5 year digital roadmap in coordination with the Bank's Business unit division heads.

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- Developed a data driven budget development, review and tracking process (using Gen AI tools to ingest, trend and alert of costs).

CIEE.ORG / Chief Information Officer / Chief Information Security Officer, VP of Technology

2016 - 2021

- Created a well-defined roadmap of strategic objectives with strong customer alignment. Directed the execution of a hybrid staffing model utilizing multiple (internal and external) teams to accelerate implementation of major deliverables. Co-ordinated efforts toward development of a five-year strategic plan through close collaboration with top executives (CEO, COO, CMO).
- Developed a Vendor Management Office responsible for all contracts and vendor relationships including COTS, NDAs, RFI/RFP, SOWs with companies on multiple continents.
- Transformed our privacy and cyber-security program in alignment with the EU GDPR, emerging state regulations as well as NIST and FedRAMP frameworks. Cost effectively rolled out a critical incident (AI/ML based) 24/7 monitoring and response process (SOC)..
- Successfully rolled out parallel plans for business delivery while revamping vendor and program management, lean/agile delivery practices (Scrum, ToC), quality assurance, cyber-security and devops.
- Worked closely with COO on the launch of a new building in Boston and acquisition of a campus in San Jose Costa Rica.
- Optimized operational performance to 99.95% uptime, driving transition to cloud-based (Office 365, Azure, Active Directory) strategy (SaaS, PaaS, IaaS, Hybrid) while optimizing business processes (Salesforce, Steelbrick CPQ, Angular + React, Netsuite / Adaptive, Five9) by initiating Lean Product Discovery and Value Stream Analysis methodologies. Trained our entire workforce on use of Office 365 / MS Teams before Covid-19. Moved large volumes of files to GDPR compliant storage and retention plan with end-to-end encryption and monitoring.
- Led a team of data scientists in devising a cloud based (PaaS) Machine Learning (Azure ML/Python) behavioral economics model in order to drive marketing micro-campaigns based on a new Unified Data Warehouse with PowerBI reports and dashboards. Implemented a PowerBI certification program supporting enterprise use (train the trainer).
- Delivered a custom insurance SaaS product for our educational programs through partnership with cloud solutions company in Norway (negotiating directly with CEO and Board Chair: Ragnar Bo - InsuranceSolutions.ai).
- Organized a consortium on next generation education, resulting in a symposium at Salve Regina University in Rhode Island (with participation of CIEE, SRU, NASA, Boeing, Educational Testing Service, Valamis - Finland, Columbia University, MIT, Harvard) working

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closely with retired NASA Astronaut - Charles Camarda PhD - STS 114 "Return to Flight Mission".

- Managed P+L portfolio of \$7.5M operational + \$10.3M capital budgets, two executive directors, two directors, and 61 FTE utilizing NetSuite ERP / Adaptive integrations. Negotiated and signed all COTS, vendor and out-sourced contracts. I got pulled into many additional negotiations including a partnership with a digital insurance tech company in Norway ([CloudInsurance.io](https://cloudinsurance.io)) where I negotiated directly with their CEO (he was initially very reluctant to partner - I was able to create a win-win partnership).

New York University / Global Program Director - PMO Director (NYU School of Law) - CIO/CISO (Engineering)

2008 - 2016

- Successfully drove optimization and innovation strategies to transform information technology at NYU. I led the first private and public cloud strategies (PaaS, IaaS) with a coherent security, privacy, and scalability model, while acting as principal architect.
- Led a team of architects in the development of a SaaS delivery service-oriented architecture to provide a method for implementing reusable micro-services and API Management (WSO2, Liferay) with integrated SSO (SAML, OAuth2, Active Directory).
- Led initiative for the successful development of a cloud based (AWS) next generation social collaboration education (FedRAMP compliant) platform called NYU Knowledge Commons enabling the delivery of complex media and lessons throughout the globe.
- Supported a NASA comprehensive digital transformation initiative using the Knowledge Commons platform, resulting in a partnership between NYU and NASA (Langley). I was instrumental in negotiating the partnership, working with NYU and NASA legal counsels, resulting in a Space Act Agreement between NYU and NASA.
- Supported a community patient outreach site with faculty through Patient Centered Outcomes Research Institute (PCORI) grants utilizing the platform.
- Initiated partnerships with Microsoft, Google, IBM, Amazon, NASA, and others on technology platform innovation.
- Launched a Law School PMO, re-structured Data Centers utilizing VMWare Hypervisors, developed a new Web site using Drupal CMS. Partnered with NSA sponsored InfoSec researchers implementing a 24/7 SOC. Managed a \$5M P+L budget for the Law School IT department.
- Working with a select group of University member school CIOs, we saved the University upwards of \$1MM in operational costs per year by defining the next generation cloud-based (SaaS) messaging and collaboration framework in partnership with Google.
- Utilized open source technologies and a novel meta-data model to develop a custom digital asset management appliance (hardware: UnRaid NAS and software OxFam ResourceSpace).

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- Worked with senior leadership on the rollout of 2 major campus launches (Abu Dhabi and Shanghai).

Principal Strategic Solutions Consultant

2006 - 2008

- Responsibilities: Leadership in the architecture and implementation of project and program management governance models for strategic programs which affected virtually every major system and process in client companies including projects for Fiduciary Trust transition to Franklin Templeton in the years after the tragic events of 9/11. Successfully implemented and utilized Python based resource and effort estimation models which I was able to publish as part of my Doctoral Dissertation. Models developed in R, Python, Stella.
- In partnership with the Ouellette Group, developed and delivered a program to train all managers, directors and assistant commissioners in NYC government on risk management, contract law, COTS, vendor, and various sourcing models through the NYC Department of Central Administrative Services (DCAS). Delivery included departments of Police, Fire, Finance, Parks, Education, DOIT, and others.

New York Stock Exchange / SIAC / Leadership

1998 - 2006

- Led the management of Unix/Linux Trading Floor Systems Integration and Information Security Administration / Penetration Testing teams.
- Led a team in implementation of project and program management practices (PMO) and KPIs using MS Project Server, Niku Clarity and PeopleSoft
- Led a multi-departmental team in the definition of change management process for an Operational Excellence Program infrastructure utilizing Remedy Change Management in support of an ITIL / ITSM corporate initiative.
- Developed a framework for assessing process improvement of our software development capability using ISO, COSO/COBIT, ITIL, CMMI
- Provided organizational representation at corporate and industry functions including: Architecture Review Process with the SEC, new employee orientations, various SIAC / NYSE steering committees.
- Principal author of the SIAC/Amex services software development methodology based on RUP/Lean and early Agile methodologies. Led the integration of large out-sourcing of critical components including COTS.
- Led the architecture and development of a highly scalable, fault tolerant Market Data platform (options price aggregator) developed in C++ on an HP-UX 11i environment utilizing an Object-Oriented Database (Versant - an early No SQL DB) for high speed data persistence on an EMC Symmetrix. The application provides a low latency Market Data Plant that requires NO database administration during daily operation.

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- Led several internal PMP certification classes for the organization's project managers - in partnership with our neighbor JP Morgan Chase ultimately leading to more than 100 PMPs.
- Responsible for teams of more than 35 members.

EDUCATION

Pace University - Seidenberg School of Computer Science and Information Systems /

Doctorate

2011

NYU Tandon School of Engineering (formerly Brooklyn Polytechnic University) /

Masters of Science in the Management of Technology

1999

Rochester Institute of Technology / Bachelors of Science - Electrical Engineering

ADDITIONAL INFORMATION

Certifications

- International Monetary Fund : Cyber Risk Supervision - 2024 (no expiration)
- Project Management Institute, PMP (20+ years, expired 2024)
- Scrum Alliance (Certified Scrum Master) - 2011 (no expiration)
- HarvardX Verified Certificate for Exercising Leadership: Foundational Principles - 2021 (no expiration)
- Organizational Change Leadership (certified with distinction while working for the NYSE, Case Western Reserve University - Dr Richard Boyatzis)

Presentations & Publications

- Lecture Series (9/2025) - City Government of Winston-Salem NC: "Rational Choices: 10 Essential Capabilities
- of Highly Effective Project Managers", in partnership with Washington College.
- Presentation (6/2023) - Finastra Ignite - Expert Panel Member : "Innovation in Banking"
- Presentation (5/2022) - Massachusetts Bankers Association - Innovation Summit: "Innovation Architecture"
- Presentation (6/2020) - University of Southern California Masters Lecture: "Quantified Risk and Value Metrics"

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- Presentation (2/2020) - Gartner CIO Conference, Phoenix Arizona: “Are your products and projects lean?”
- Presentation (3/2016) - NYSPIN.ORG: “Rational Choices: a methodology for aligning organizational objectives.”
- Presentation (10/2015) - WSO2Con 2015 USA: “Architecture Innovation: Jump-Starting Middleware Services”
- Dissertation Defense (11/2011) - “A computational econometric modeling technique for the parametric simulation of effort and duration estimation as applied to the development of software systems”
- Book: “The Agentic Enterprise: A Human-Centered Framework for Governed Multi-Agent Artificial Intelligence - an Architecture for Ethical and Effective Workflows in Enterprise Knowledge Work”
 - Lead Author: Peter J Morales, PhD;
 - Draft in editorial review – Summer 2026
- Book: “Rational Choices - 10 Essential Capabilities of Highly Effective Project Managers”
 - Lead Author: Peter J Morales, PhD;
 - Draft used as textbook for course delivered through Washington College – Fall 2025
- Book: “Process Simulation and Parametric Modeling for Strategic Project Management”
 - Lead Author: Peter J Morales, PhD; Dennis Anderson, PhD (Provost - St. Francis College)
 - Springer Briefs in Electrical and Computer Engineering – June 2014
- Article: “Is Scalable Cloud Computing Ready for Higher Education?”
 - Lead Author: Dennis Anderson, PhD, Peter Morales PhD, Rogerio Panigassi, Microsoft
 - Microsoft TechNet – July 2011
- Report: “Symposium on Digital Education”, Salve Regina University
 - Lead Author: Dr Charles Camarda (NASA - STS 114), Dr Peter Morales CIEE/NYU.
 - Participants from CIEE, NASA, Boeing, NYU, MIT, Harvard, Salve Regina University, Arcusys (Finland)
 - October 2019
- Report: “A Computational Econometric Modeling Technique for the Parametric Simulation of Duration and Effort Estimation as Applied to the Development of Software Systems”
 - Provisionally patented models written in Python
 - Peter J Morales - Doctoral Dissertation Defense, Pace University – December 2011

Volunteer work:

- Columbia University Business School - Justice Through Code 2024-2025
- Ware Senior Center - Ware MA 2023-2024 (taught courses in Digital Literacy and Security)
- Friends for the Homeless - Springfield MA - 2021-2024

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- Habitat for Humanity - Roslyn NY - 2001-2006
- Interfaith Nutrition Network - Hempstead NY - 1997-2000

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