

Stephen Lese

Operator | Product & Strategy

stephenlese96@gmail.com • (917) 232-5184 • linkedin.com/in/stephenlese/ • stephenlese.com

Summary

Operator with a background in investment banking, strategy consulting, and product management at a fintech startup. Strongest at translating operational complexity into execution, building workflow-heavy products, and using Claude and Codex to build API integrations and evaluation workflows.

Independent AI Product Development | June 2026 - Present

- **Collections Copilot:** Built an invoice collections workflow with QuickBooks sandbox and Gmail integrations, invoice reconciliation, editable follow-ups, and human review; tested draft persistence, source changes, and duplicate-send safeguards
- **Waiver Review & Evaluation:** Built a credit-waiver workflow with source and calculation checks before human review; evaluated 13 controlled scenarios and built a workbench to compare results
- **Training Table:** Built a training and nutrition app with guided workouts, AI meal logging and conversational plan editing

More projects, write-ups and live demos at stephenlese.com. Happy to share demo access.

Experience

PactFi (early-stage fintech startup, private credit workflow automation)

New York, NY

Product Manager

01/2026 - 06/2026

- Led development of a new product offering for law firms, expanding the platform into a new client vertical and contributing to ~\$250K in contracted annual recurring revenue (CARR) within the first month of launch
- Restructured product development to run design and engineering in parallel, reaching the customer sandbox in 6 weeks
- Developed revenue projections and product charter used in company's first post-Series A board meeting; projections landed within 10% of actual results over the first 5 months and charter shaped client-specific pitch materials across 3 target segments
- Drove feature prioritization to address product underutilization; deal activity from the largest client increased 100% within two months of improvements shipping

MediaLink

New York, NY

Senior Associate, Private Equity & Corporate Strategy Consultant

06/2022 - 01/2026

- Led commercial diligence for private equity investments across media, technology, and marketing services, building the financial models, TAM analyses, and growth forecasts behind investment theses on transactions from \$25M to \$200M+
- Led operational transformation initiatives for Fortune 100 and enterprise clients, including a creative studio restructuring that reduced operating costs by 30%
- Productized internal benchmarking and transformation methodologies into scalable advisory offerings adopted across multiple client engagements, generating \$2M+ in revenue

PJT Partners

New York, NY

Investment Banking Analyst, Secondary Advisory Group

06/2019 - 06/2022

- Supported execution of \$5B+ in secondary and strategic transactions across energy, infrastructure, and entertainment sectors through financial modeling, investor materials, and transaction analysis
- Led analytical workstreams addressing investor concerns around long-term contract durability, supporting a \$300M investment and successful \$1.1B transaction
- Built strategic analysis that helped re-secure a paused \$1.5B transaction mandate during COVID-related market disruption, ultimately contributing to a successful sale process

Education

Washington University in St. Louis

St. Louis, MO

Bachelor of Arts | Majors: Economics; Finance

08/2015 - 05/2019

- GPA: 3.82 | College Honors; Distinction in Economics; Entrepreneurship Competition Winner; Top Trader Award; Dean's List
- Teaching Assistant (Investments); President, Investment Banking Association; Finance Director, Interfraternity Council

Skills

AI & Development: Codex, Claude Code, Cursor, agentic workflows, prompt design, Next.js, Vercel, Supabase

Course Certificates: Agentic AI (DeepLearning.AI); Claude Code and Model Context Protocol (Anthropic)

Product Management: Confluence, JIRA, LogRocket, HubSpot, Excel, PowerPoint