

Marc Cheatham

Chief Technology Officer • Chief Information Security Officer • Executive Technology Leader

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Executive Summary

Technology and security executive with over 25 years of experience building secure, scalable, and analytically sophisticated platforms for the financial and investment industries. Proven leader in enterprise architecture, cybersecurity, cloud engineering, software development, and organizational strategy. Experienced CTO, CISO, and Acting CEO with deep expertise in financial modeling systems, DevOps automation, and AI-driven development processes.

Professional Experience

Chart Room AI — May 2026 to Present

Founder & Chief Executive Officer

- Chart Room AI founded to develop next-generation AI-powered platforms that combine financial intelligence with productivity-enhancing tools for investment firms and technology teams.
- Designed and built multi-agent AI frameworks that automate software development workflows, code generation, testing, and deployment — dramatically accelerating product delivery cycles.
- Created AI-driven project management tools that automate task breakdown, sprint planning, progress tracking, and risk forecasting, delivering measurable gains in team velocity and visibility.
- Developed intelligent AI agents that help users embed AI-driven workflows into their daily operations, including automated decision support, document generation, and cross-tool orchestration.

Caravel Concepts — May 2022 to April 2026

Chief Technology Officer • Chief Information Security Officer • Acting CEO

- Developed a multi-agent AI platform performing cash flow forecasting, tax analysis, and financial planning.
- Implemented AI driven project management and DevOps workflows resulting in substantial gains in developer productivity.
- Developed and implemented the firm's Information Security Policy, successfully passing external client audits.

- Implemented Infrastructure-as-Code using Terraform, enabling automated testing of infrastructure upgrades.
- Designed a full CI/CD DevOps pipeline with integrated security controls and automated compliance workflows.
- Created an AI-based development framework integrating coding standards, security policies, ticketing, and SIEM.
- Led development of an enterprise Asset–Liability Modeling engine supporting long-term funding optimization.
- Built a Capital Market Modeling platform generating asset-class projections using Monte Carlo simulations.
- As Acting CEO, managed operations, business planning, investor relations, and engagements with VC and banking partners.

RiverFront Asset Management — 2008 to 2022

Chief Technology Officer • Chief Information Security Officer

- Built and led all technology, cybersecurity, infrastructure, and software development for a \$10B asset manager.
- Implemented the firm's Information Security Policy meeting strict PII and cybersecurity requirements.
- Early adopter of Microsoft 365, enabling seamless transition to remote operations during COVID.
- Integrated Microsoft 365, SOC services, and compliance automation to reduce quarterly audit prep.
- Designed and developed trading systems supporting SMAs, UMAs, and ETFs with integrations to APL and Investnet.
- Built enterprise asset sales reporting systems with automated integrations to major U.S. investment partners.
- Engineered private-cloud disaster recovery and business continuity solutions for critical systems.

Wells Fargo Securities — 1996 to 2008

Director of Analytical Support

- Reported directly to the Chief Investment Officer, delivering analytical platforms for investment teams.
- Designed the firm's Financial Securities Data Warehouse supporting enterprise investment analytics.
- Developed the firm's Asset Classification System used across trading, research, and portfolio management.
- Architected portfolio analysis software used by 15,000+ financial advisors.
- Built mutual fund trading analysis systems and a fixed-income cost-basis calculation engine.

Areas of Expertise

Industry Expertise

- FinTech
- Asset Management
- Capital Markets
- Enterprise Software
- Cloud Computing

Management Practices

- Strategic Planning
- Executive Leadership
- Risk Management
- Vendor Management
- Product Development
- Business Operations
- Compliance Oversight
- Cross-Functional Leadership
- Investor Communication

Functional & Technical Skills

- DevOps
- Terraform
- AWS/Azure
- CI/CD Automation
- Cybersecurity
- Cloud Architecture
- API Design
- Data Warehousing
- AI-Assisted Development
- Modeling Engines
- Optimization Systems
- Object-Oriented Design
- SOLID Principles
- Test-Driven Development (TDD)
- Clean Code Practices

Education

Bachelor of Science, Computer Science

Minors: Physics and Economics

University of Richmond