

NAME

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City, ST zip

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Qualification Profile

- ❖ Highly accomplished content expert, publisher, web developer, editor, and author with expertise in retail institutional and intermediary financial sectors as well as general interest and public service publications.
- ❖ Adept in all facets of business management, P&L responsibility, sales management, strategic planning, and marketing.
- ❖ Registered Principal with Series 7, 66, and 24 licenses.
- ❖ Recipient of multiple awards including Polk Award and Gerald Loeb Award for National Business reporting.
- ❖ Served on a task force that was awarded the Pulitzer Prize.

Professional Background

Company - City, ST (2007 - 2008)

Editor in Chief / Executive Director - Company

- ❖ Maintained full responsibility for all aspects of marketing and communications efforts.
- ❖ Managed US editorial-like publications facing the client and Financial Advisors.
- ❖ Revised field content architecture.
- ❖ Pioneered the launch of new publications to the field based on readership need research.
- ❖ Established the new ultra high net worth magazine, View, for high profile clients.
- ❖ Revamped and revised 2 high net worth publications, Symposium and Wealth Management Magazine.

Company - City, ST (2000 - 2006)

Editor in Chief / Director - Company Private Client

- ❖ Introduced The White Papers aimed at institutional-like ultra high net worth clients.
- ❖ Collaborated with MLIM on the coordination of mutual fund promotions.
- ❖ Wrote and edited a major disclosure document.
- ❖ Maintained sole accountability for all retail publications for 7 million clients.
- ❖ Developed and implemented web campaigns and content redo of client website.
- ❖ Successfully launched glossy custom published magazine to high net worth clients, which was acknowledged as the best representation of wealth management by Stan O'Neal.
- ❖ Provided leadership and direction to 5 Vice Presidents.
- ❖ Directed the Creative Resource Group for collateral materials.
- ❖ Served as the primary liaison for all marketing initiatives with Office of General Counsel.
- ❖ Managed retail compliance and served as the Registered Principal.
- ❖ Designed and edited publications aimed at intermediary law firms, accountants, and financial planners.

Company - City, ST (1992 - 2000)Publisher & Vice President of Electronic Publications

- ❖ Managed P&L responsibility for S&P Insurance Ratings publications, marketing, sales, and editorial.
- ❖ Selected as the Publisher of globally written and electronic material for \$1.5 billion company dealing with thousands of institutional transactions and ratings per year.
- ❖ Maintained direct control of London operations.
- ❖ Worked with all major investment banking firms, which included marketing, selling, and delivering data and analytical reports.
- ❖ Collaborated with major intermediaries, agencies, law firms, and brokers in providing detailed statistical, analytical, and rating reports.
- ❖ Played a key role in formulating, writing, editing, and distributing publications that covered diverse financial topics.
- ❖ Championed process re-engineering efforts and enhanced operational efficiency.
- ❖ Recognized as the developer of Ernst & Young \$35 million web project.
- ❖ Published first book of insurance ratings partnering with McGraw-Hill.

Company - New York, NY (1988 - 1992)Managing Editor - The Journal of Commerce / Assistant General Manager - The Journal of Commerce

- ❖ Provided leadership and direction to a team of 125 employees on 5 continents.
- ❖ Re-organized and revived KRI business.
- ❖ Directed business management, P&L management, and operations management efforts.

Additional Experience

Co-founder & Executive Vice President - Company, New York, NY

Reporter & Editor - Company, City, ST

Delaware Bureau Chief - Newspaper, City, ST

Awards

George Polk Award for National Reporting

Gerald Loeb Award for National Business Reporting

Pulitzer Prize for General Local Reporting - Task Force Member

Education & Training

Darden School - *Executive Marketing Program*

Northwestern University - *Master of Science in Journalism, Communications*

University of Illinois - *Bachelor of Science in Communications*

Temple University School of Law - *Legal Studies*

Training: Web and Programming Courses, Object-oriented Business Planning