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WORK EXPERIENCE:

Oak Point Property Owners Association, Lake Brownwood, Texas **March 2017 – to Present**

President of the Board
As president of the board (volunteer basis), I am responsible to lead the board members in our monthly meetings, manage the day to day needs of the association, and be a liaison between vendors, suppliers, and our property management company. Additionally I am involved with the financial management of the organization, and ensuring that project planning and execution are completed as needed.

EDWARD JONES, Odessa, Texas **February 2017 – to Present**

Financial Advisor/Business Owner
In February of 2017 I opened my own Edward Jones Investment office in Odessa, and began building my own practice after many years in the industry. I run and manage my own office, and have a small staff that reports to me. I work with local business owners and families in building and managing their assets.

JPMORGAN SECURITIES/JPMORGAN CHASE & CO., Odessa, Texas **June 2008 – February 2017**

Vice President of Investments/Private Client Advisor/Financial Advisor
As a Private Client Advisor, I would independently acquire and deepen relationships with clients through comprehensive needs based marketing and promotion of investment products within our bank branch environment. I would work with my Branch Team to identify client needs, analyze customer information, define investment goals, build plans and make recommendations for clients to achieve their investment goals and objectives through individual investment strategies while exceeding asset and revenue targets. I was responsible for advising clients with complex investment needs with asset allocation and portfolio construction. In addition to advising clients, I was also responsible for coaching and training Personal Bankers (licensed) on how to make recommendations and educate them on our investment products and services. I was responsible for the entire sales process from prospecting for leads, account set up, and ongoing servicing of accounts for my book which is valued over $115mil. Gross production (trailing 12) is in the $450-500mil range annually. In my nine years with JPMorgan I increased revenue and AUM for my branches by over 600%, averaging $15mil in AUM net growth each year. I would consistently rank in the top 25% of our entire field sales force, and top 10% regionally.

PRINCIPAL LIFE INSURANCE CO., Des Moines, Iowa **July 2000 – June 2008**

Senior Product Manager 2006-2008
Independently managed new and existing products within the product portfolio management process. Planned and managed key competitive and market research projects for the Individual Disability segment of the company, and led Competitive and Market Intelligence Initiatives. Contributed to the Segment's profitable growth by providing information and analysis for strategic planning and tactical business initiatives. Utilized research methods to identify market and distribution segments and recommend strategies to develop them. Initiated, coordinated, analyzed, and provided solutions to quantitative and qualitative research necessary to effectively manage the product line,

including new product ideas and product enhancements, in alignment with business objectives. Monitored and reported on trends and regulatory factors which may impact product and/or processes. Drove and was involved with the implementation and analysis of initiatives to support the product line strategies. Provided leadership and support to the Product Development Committee for planning and product portfolio analysis and idea management processes for the product portfolio. Drove outcomes to support overall strategies. Analyzed product performance, identified gaps, and generated ideas for new product development, enhancements to existing products and product retirements. Responsible for the preparation of business and marketing plans for new products and services to achieve organizational, financial, and marketing objectives. Led and participated in projects utilizing project office methodologies, including project management tools, project monitoring software, and CBA to ensure proper management of projects. Developed and oversaw project communication regarding the progress and performance in the product development process. Provided ongoing team member development and motivation through coaching, mentoring, facilitating learning with the team, and creating a line of sight. Consulted, provided technical/product expertise, educated others (internal & external) on cost/risk, and provided recommendations on product systems and/or processes to maximize product line performance. Managed relationships with business partners (vendors, re-insurers, sales partners) to ensure that products and services continued to meet objectives and client needs.

<u>Lead Business & Operations Analyst/Project Manager 2002 - 2006</u>
Responsible for all operational, strategic, project management, business analysis and other needs of the internal financial services sales distribution channel (Principal Connection) of the Principal Financial Group. Managed the day to day operations of the sales team, as well as developed and planned new initiatives to support the growth and strategies of the sales force. In addition to my own responsibilities I also managed a team of business and operation analysts who assisted with and supported all operational needs of Principal Connection and I temporarily filled the role of Program Management Officer for 1 1/2 years due to a department merger. Responsibilities included training, marketing, system support and development, sales staff development and management, strategy development and implementation, project management, product development, research and analysis, reporting and budgeting, tactical and strategic planning, forecasting, contract/vendor negotiations, compliance adherence, as well as coordination and liaison work with other functional areas of the company on cross business unit projects. As a Lead Business & Operations Analyst/Project Manager some of my specific responsibilities included managing the operations of the Principal Asset Reward Program (PARP), Project Management for the newly formed Business Enhancement, Life/DI and Income Management teams of Principal Connection, leading various Asset Retention initiatives including the Plan/Contract Termination and Benefit Event processes to maximize retention, efficiency, and profitability. Counselor training, coordination, development and implementation of direct marketing and new product endeavors to increase sales and saturation in the market. Developing and leading the departments' e-signature strategies, team lead on reporting and analysis both within Principal Connection and across Business Units, and I was the technology lead for the various tools and software utilized by the department. I was involved with the development of the corporate GEE strategy Retire Secure, and I was a member of several operational excellence projects (Six Sigma Green Belt). Other responsibilities have included creating, researching, developing, business intelligence gathering, reporting on and implementing various new projects, pilots, strategies, initiatives and products within the department and company.

<u>Investment Sales Counselor/Financial Advisor 2000 - 2002</u>
Prior to moving to the Business analyst role I held an in-house investment sales counselor position with this global Pension and Insurance provider. I provided investment and financial counseling to existing plan participants and new clients by utilizing various selling techniques to effectively market and sell investment-related and insurance products on a Retail basis.

FARM BUREAU FINANCIAL SERVICES, Carlisle/Norwalk, Iowa **Mar. 2000 – June 2000**

<u>Career Agent/Financial Advisor</u>
Outside sales consultant with this leading Insurance provider. Set up and managed a private sales office with a small staff. Sold and serviced various insurance products including both Personal and Commercial lines. Offered various financial services to existing client base and used various marketing techniques to attract new clients.

EMPLOYEE MANAGEMENT INC., Woodbridge, New Jersey **Oct. 1998 – Mar. 1999**

District Sales Manager
Represented this Professional Employer Organization (PEO) by providing services to businesses in need of Human Resource management. Job functions included prospecting for leads, consulting with clients, selling services, and maintaining the current customer base. Primarily worked with small to medium sized business owners, while consulting with all members of management and staff. In-depth training included all aspects of Human Resources including health insurance, worker's compensation, government regulations, payroll, and legal issues of small businesses along with other various small business management concepts.

DATA TRANSMISSION NETWORK, Edison, New Jersey **Aug. 1990 – Oct. 1998**
Des Moines, Iowa

District Sales Manager 1996 - 1998
Full-time sales position with this satellite communications firm selling annual subscriptions to targeted prospects. Promoted and sold over twentyfive different levels of service to various industries. Managed a large subscriber database including current customers and prospects. Set-up and maintained a sales office while over-seeing a moderate sized sales staff in a designated territory. Researched, defined, analyzed, and recommended cost-effective business solutions. Trained and organized classes for sales staff on a corporate wide basis at annual meetings. Utilized a variety of sales approaches to achieve goals: third party referrals, cold calls, following up on leads provided by home office, etc. In first three months exceeded all sales goals by 50% or more.

Senior Sales Associate 1990 - 1996
Prior to being promoted to a District Sales Manager I worked in the home office as a Senior Sales Associate. In one year generated in excess of 500 satellite sales along with over 150 internet subscriptions; company average was 230 annual sales. Experienced with out-bound cold calling and inbound phone sales techniques plus personal demonstrations and sales closure methods. Represented product lines in office to prospects, and worked outside of office at trade shows. Helped educate field sales staff by answering Hotline and gave presentations annually at the National Sales Force conferences. Was one of 10 people out of a 250+ sales force recognized in "**Presidents Club**". Received Customer Service Excellence award in 1996. Personal cancellation rate of only 5% versus company average of 60%. Implemented a corporate wide Intern program and managed a staff of 4-7 college students within the sales department.

TRAINING: Government Regulations for Small
Worker's Comp., Disability, Unemployment,
and Health Insurance Training
Human Resource Management Training
Computer Method Training (Excel, Word,
PowerPoint, Publisher, etc…)
Customer Service Method Training
Management Guidelines
Personality Profile Seminar
Ask, Listen, & Sell Program
Sales Training Module (features/benefits)
Integrity Selling Program
Dr Pfau's Public Speaking and
Executive Image Training

Businesses Business Objects/Web Intelligence Training
Cost Benefit Analysis Training
Managing Goal Achievement
Management Orientation
Expense and Time Management
Decision Management
Estimating and Scheduling
Project Management Fundamentals
Essential Skills for the Business Analyst
Operational Excellence Six Sigma (Green Belt)
Situational Leadership
LOMA Level 1 Certificate
AAMS Accredited Asset Management Specialist

LICENSES: Life & Health Insurance
FINRA Series 7, 6, 66, 63
Property Casualty, Personal & Commercial Lines Insurance (inactive)

EDUCATION: Simpson College, 1994-1996
Vocal Performance Major
Business Management Minor
Grinnell College, 1993-1994

OBJECTIVE:

My career history includes sales, human resources, employee management, customer service, project/product development, board leadership, business management, investments/insurance, business analysis, research, reporting and marketing. My varied background allows me to wear many "hats" and adjust easily to fit the needs of almost any organization. This will allow me to step into any position and hit the ground running. I have always been a self-starter, and I work well both independently and in a team environment. I am confident, considerate, and have the ability to work with all levels of an organization to gain acceptance and buy-in. I always keep a close eye on the bottom line, and work hard to create more effective and efficient business solutions. I feel that these skills will add a great deal of value to your current staff, and fulfill your business needs.