
PROFILE

Inspirational, highly motivated **Sales and Marketing leader** with proven headquarters and field record of expanding distribution capabilities and sales growth; creating and executing progressive marketing, sales and service programs and tools that enable top line and bottom line growth.

- Successful leader & people developer of **high-performing sales, sales support and marketing teams**
- **Solutions-driven collaborator who drives measurable results in matrixed organizations**
- Channel and enterprise **marketer who excels at** building and executing **strategic marketing plans**
- **Innovator** of Relationship Marketing Department and opening new channel outlet with CPAs
- Sponsor of **digital marketing, CRM, and sales force automation solutions**
- **Inclusive organizational change leader and process optimizer**

EXPERIENCE

ILLINOIS MUTUAL LIFE INSURANCE COMPANY, Peoria, IL

2019 –2023

Vice President, Sales and Distribution

- 2020 sales exceeded industry results in our target middle market, despite COVID's significant impact on our agents and their customers. 2022 and 2023 were the best total sales years in over a decade at 15% and 23% growth over prior years.
- Accountable for setting / implementing strategy for life insurance, disability income insurance, and worksite distribution sales through >12,000 independent agents with \$110M in total premium.
- Responsible for leadership, development and performance of the 25 member sales team, including goal setting, strategy implementation and activity plans to profitably grow the business in target distribution segments.

ONEAMERICA, Indianapolis, IN

2011 – 2019

Vice President, Marketing and Sales Support, Individual Life and Financial Services Division

- Developed strategy, systems, & programs focusing on profitable growth across multiple sales distribution channels (career, independent, IMO, banks). Led team of 22 associates, with a budget of \$8M. Contributed to 50% increase in annual life & annuity sales, and 52% increase in hybrid long term care sales
- Implemented modernized marketing, fiduciary concierge, digital enablement (with agile development), straight through processing, product positioning and field hospitality. Syndicated four lever framework for distribution expansion.

DISTRIBUTION AND MARKETING SOLUTIONS, Rumson, NJ

2010 – 2011

Consultant

- Advisor to consulting company which focuses on top-line growth in diversified financial services companies

PENN MUTUAL LIFE INSURANCE COMPANY, Horsham, PA

2008 – 2010

Senior Vice President, Sales Support

- Revitalized career and independent distribution channels, contributing to >47% sustained growth in annual life sales

AXA EQUITABLE, New York, NY

1983 – 2008

Senior Vice President, Retail Profitable Growth and Sales Implementation (1998 – 2008)

- Promoted to lead new team to support 6,000 advisors, 52 branches, and \$4.6B variable annuity, \$385M life and \$5.7B broker/dealer sales in 2007. Accountable for a team of 105 and \$25M budget, with heavy matrix responsibility
- Led Task Force for new CEO to achieve aggressive 33% reduction in people and expense (\$25M) without sales impact
- Developed and deployed three CRM technology solutions to more than 6,000 financial advisors.
- Owned or contributed to impactful profit and strategic programs, including the MONY acquisition, reengineering new business, realigning field structure and compensation, starting up wholesaling department, national orphan program

OTHER PROFESSIONAL INFORMATION

- Current Chair, LIMRA's Independent Producer Committee
- Past Chair, LIMRA's Strategic Market Issues Committee (SMIC) (2008 – 2010). Member 2000-2018.
- Previously registered Series 7, 24, 63 FINRA Principal + Investment Advisor Representative (IAR)
- Former Member, Board of Directors, of HTK, Frontier Federal Savings Bank, and AXA Advisors
- Member, Finseca (formerly AALU & GAMA), NAIFA and Independent Insurance Agents of Illinois
- Attended InsureTech Connect 2018, as part of establishing OneAmerica's first marketing innovation practice
- Speaker, LIMRA, LOMA & LTCI Conferences on distribution reengineering and best practices, digital and marketing
- District Chair, Pathfinder District, Crossroads of America Council, Boy Scouts of America, 2019
- Board Member (and Development and Audit Committee member), Methodist Health Foundation from 2014-2018

EDUCATION

M.B.A., General Management Curriculum, Harvard Graduate School of Business Administration
B.A., Magna Cum Laude, Harvard College (completed studies in three years)