Jonathan R. Mathews, MBA

`
j_mathews17@outlook.com
85 Longmeadow Drive
Pomfret Center, CT 06259
C: (785) 840-6339

SUMMARY OF QUALIFICATIONS

Highly dedicated results-oriented individual with a proven record of success in financial services.. Began in the industry in sales and marketing and transitioned to market research and analysis, culminating in strategy and collaboration. A meticulous, analytically driven person who enjoys working on challenging and complex projects, able to resolve them in an accurate and timely manner. Significant experience in implementing business analytics and marketing intelligence tools and techniques to identify meaningful market trends and patterns that add value to overall company's performance. Comfortable working with senior executives, presenting recommendations, and executing on strategic initiatives and goals. *Key strengths include:*

• Strategic Research & Analysis • Product Management & Development	• Cross-team Collaboration • Project Management & Operational Improvement	• Relationship Management • Data Analytics & Process Improvement

PROFESSIONAL EXPERIENCE

GRAIL, Menlo Park, CA, USA — June 2023 – Present

Associate Director, Distribution Leader - Life Insurance Channel
Distribution Partnerships & Activation Leader within Enterprise Sales, presenting the Galleri multi-cancer early detection technology and GRAIL's policyholder program to decision-makers and distribution partners. I work within Life Insurance Customer Success to engage, educate, and activate financial professionals to get as many multi-cancer early detection tests completed. Responsible for activation of eligible policyholders, training, education for external partners, and strategic initiatives and guidance for growth for internal partners as the Insurance Industry SME.

MANULIFE JOHN HANCOCK, BOSTON, MA, USA — April 2020 – June 2023

Director, Product Manager, Accumulation Suite - US Insurance Jan 2023 - June 2023
Product manager accountable for successful product planning, development, and execution. Primary responsibilities include maintaining the accumulation design products to drive business profitability and growth. I partner closely with actuarial, sales and distribution, marketing, and strategy while maintaining the entire lifecycle of the accumulation products across the US Business product portfolio that accounts for roughly $48M in US Life Insurance sales.

Director, Head of Product Intelligence & Competition - US Insurance April 2020 - Jan 2023
Team lead of product intelligence and competition for John Hancock US life business; parallel reporting & collaboration with Manulife Financial. Regularly inform Product, Pricing, Corporate Strategy teams, C-suite executive leadership around the competitive landscape. Understand goals and opportunities for the business through sales trends, new biz pipeline, and product marketplace. Aligned with Marketing, Sales & Distribution to most effectively position our products. Manage vendor relationship budget and contracts of $140k+ annually. Oversee competitive casework to better understand trends, engage with sales to help win cases with new business value direct impact of ~$10m annually.

Accomplishments

- Manager of others (currently 3 direct reports) that leads the business and intelligence functions for JH insurance; created a new one-stop shop for competitive intelligence resources
- Collaborated with data & analytics teams to build out Tableau dashboards and democratize data resources for competitive analysis leading to increased sales and strengthen relationship with sales & distribution
- Collaborated with Marketing and launched 2 marketing campaigns targeting 40k licensed agents and producers; created national webinars and JH Sales podcasts
- Built trust and credibility by working across business groups to improve transparency and understanding of both our own internal business practices and those of our competitors

PRUDENTIAL FINANCIAL, Newark, NJ, USA

U.S. Corporate Division – Research Consultant, Market Trends and Insights October 2017 – April 2020
Within the CMO Center of Excellence: the Decision Insights Group. Primary responsibilities include leading the insights generation, research, and analysis of the intermediary space (Financial Advisors, Broker Dealers, Insurance Agents, etc). Support the delivery of strategic initiatives to achieve profitable growth across sales and distribution channels, including DTC by driving at marketing excellence, improved data analytics, and key partnerships.

<u>Accomplishments</u>

- Conducted marketing research to analyze advisors and customers' needs and demographics
- Identified potential markets and factors affecting product demand leading to new PGIM marketing initiatives
- Supported US Business Strategy develop and inform senior leadership around Future of Work capabilities
- Determined trends and uncovered insights related to Financial Wellness in the military veteran space
- Built productive partnerships and facilitated a smooth integration of cross-team collaboration
- Reported trends and behaviors of advisors related to portfolio construction and investment preferences

Pruco Life Insurance – Regional Sales Consultant, Hartford CT, USA February 2016 – October 2017 Focused within a geographic territory and worked with brokers and financial advisors to provide product information, share sales ideas, gather marketing data, and offered sales support. Incorporate sales methodologies/interviewing skills to learn about representatives' business and needs to suggest sales and marketing ideas. Endorse the firm and national account initiatives to meet goals through campaigns. Assist clientele with sales and marketing material, product analysis, and problem resolution in a professional and timely manner. Create and tailor sales ideas and presentations based on advisor profile and needs and deliver product and value add presentations. Performed competitive analysis within product line-ups and maintain knowledge of the financial services industry.

<u>Accomplishments</u>

- Regularly exceeded all core sales activity (Calls: 118%, Leads: 109%, WebEx 63%)
- Partner production goals regularly exceeded (138% and 126%)
- IW Uncovered Paid Target Premium ($792k annual)
- Created a 'dual income period' case design and shared with senior leaders
- Launched and shared best practices related to VUL positioning and firm campaigns

EDWARD JONES, Lawrence, KS, USA September 2014 - December 2015

Financial Advisor

<u>Accomplishments</u>

- Prospected and facilitated client seminars related to 529s, retirement income, and Social Security
- Recognized target markets and created a database of over 600 prospects in my geographic area
- Solicited and executed trades based on knowledge of my customers
- Designed and enacted a marketing plan in the region including digital and print advertisements

UNITED STATES AIR FORCE, Topeka, KS USA

Security Forces – Noncommissioned Officer (E-5) March 2006 - April 2015

Base Defense Operations Center/Standards & Evaluation/Quick Reaction Team

<u>Accomplishments</u>

- Placed orders and negotiated prices with vendors and distributors
- Distributed and reallocated supplies among the unit
- Analyzed inventory levels and did monthly inventory checks for property over $1B in value.
- Annually trained and certified unit personnel (~90 individuals) and provided guidance and actionable feedback to help them improve. Obtained 100% pass rate for all trainees under my supervision.
- Exclusively managed and edited a monthly update, distributed to the squadron.

EDUCATION

University of Connecticut School of Business, Hartford, CT December 2019
Master of Business Administration (MBA)
Concentration in Marketing and Finance
Study Abroad: Certificate in International Business – EMLYON Business School (France)

University of Kansas, Lawrence, KS May 2014
Bachelor of Arts (BA) in History
Business Minor

Community College of the Air Force, Montgomery, AL May 2009
Associate of Applied Science (AAS) in Criminal Justice

LICENSES/REGISTRATIONS/CERTIFICATIONS

- FINRA Series 7 & 66 (inactive)
- State of Connecticut Life, Health, Variable Annuities License (inactive)

LEADERSHIP/COMMUNITY INVOLVEMENT

- NECONN Coed Soccer Coach (U10, U15)
- Frog Rock Basketball Coach
- Member of the MBA Marketing Club (UConn)
- Be The Match and Leukemia Lymphoma Society - Advocate and Fundraiser