

JASON JONES

2011 October Way ▪ Anywhere, U.S.A. 12345

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Executive Management ▪ Board of Directors *Director of Marketing ▪ Institutional Financial Services*

An astute, progressive leader with broad expertise and experience encompassing in-depth comprehension of: the institutional asset management business, the sub-advisory market, consultative sales and effective long-term strategies. Successful in the orchestration and governing of: investments, marketing, operations, administration and team-building. Committed to a comprehensive and collaborative approach vs. the achievement of individual goals; quick to praise and gratified when motivating others to succeed in attaining a unified objective. Articulate communicator with an approachable management style.

Leadership/Management/Mentoring
Talent Recruitment/Hiring
Strategic Planning/Budgeting
Collaborative Asset Growth
New Product Development
Consultative Sales

Relationship Cultivation/Management
Due Diligence/Manager Research
Client Presentations
Operations/Administration
Compensation Review/Distribution
Brand Recognition

CAREER ACCOLADES

- As *Director of Marketing/Principal/Executive Council/Board of Directors with ABC Corporation*, cultivated and maintained lucrative, beneficial institutional relationships, in addition to having developed and managed the sales/marketing efforts which contributed to the **growth in assets of 300% to total more than \$4.3 billion and increase in staff of 100%**.
- Expanded *ABC's SMA – Separately Managed Account Division* account base **10+ fold**, to include advisory and sub-advisory relationships with Morgan Stanley, UBS, Smith Barney, Merrill Lynch, Wells Fargo, Charles Schwab, Morgan Keegan, et al, from an initial relationship with Paine Webber.
- Established brand name as a national organization, secured sub-advisory SMA relationships with Paine Webber/Morgan Stanley and dual contract relationships with Smith Barney/Merrill Lynch, during the tenure as *Director of Marketing for XYZ Corporation*. Results included an **increased asset base of more than 100% to total \$1.1 billion**.
- While *National Sales Manager with Major Financial Institution* and selected to continue development of the Managed Accounts Department upon departure of the head of the division, collaboratively formulated the foundation for the Consulting Services/Managed Accounts Department. Included was the creation and roll-out of the: single contract sub-advisory product (Access), Portfolio Management Program (PMP), performance measurement system and wrap fee billing system. Initiated and managed: Divisional Managed Accounts Consultants (DMACS), branch Tech Analysts group and internal marketing materials to support diverse investment products. Successful accomplishments were: the **revolutionizing of the fee-based business model vs. commission-based, being recognized as one of the largest revenue generating divisions at the firm and industry-wide brand awareness**.

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EMPLOYMENT HISTORY

ABC Corporation – *Anywhere, USA*

**Director of Marketing ▪ Principal
Executive Council ▪ Board of Directors**

06/1998 – Present

The public representative of the firm, involved in every aspect, both independently and collaboratively, which encompasses the overseeing of growth and management of all areas and includes: marketing, sales, relationship cultivation, product development, staff hiring, employee supervision, compensation, bonuses and office space.

- Innovated usage of leverage by hiring five wholesalers to represent the firm country-wide while building an internal wholesalers group of four to support the external wholesalers.
- Independently compiled the FAQ library; continued the expansion of the internal clerical/support team with a focus on RFPs (Request for Proposals) and collaboratively edited firm-wide marketing materials, with the assistance from retained outside specialists.
- Travel extensively to develop, maintain and enhance associations, effectively market in downward trending cycles to retain client assets and provide up-front communication regarding the asset base and management of business in a challenging environment.
- Created multiple white papers focused on the consultative selling and the aspects of increasing fee based business and aided in the 100% retention of sub-advisory partners.

XYZ Corporation – *New York, NY*

Director of Marketing ▪ Principal

01/1992 – 05/1998

- Proactively enhanced company recognition from a regional asset management firm to a national organization, contributed to the growth in assets of \$500+ million and sub-advisory and advisory partnerships, four-fold.
- Governed all marketing efforts, pivotal accounts and due diligence relationships. Successfully introduced the firm to the institutional consultant industry.

ADDITIONAL EXPERIENCE

Major Financial Institution – *Weehawken, NJ*
National Sales Manager ▪ Managed Accounts Services Division

Investment Banking Firm – *Atlanta, GA & Wilmington, DE*
Associate National Sales Manager ▪ Consulting Services Department
Financial Executive

Private Investment Firm – *Atlanta, GA*
Regional Director

EDUCATION

Bachelor of Arts ▪ Journalism ▪ *Major* - Advertising ▪ *Minor* – Business
Your College – *Anywhere, U.S.A*