Your Name
Phone Number | E-Mail Address | LinkedIn

SALES MANAGEMENT INSTITUTIONAL /RETAIL

Resourceful and diverse revenue producer with vast skills and abilities that span more than two decades in: sales, the establishment of long-term, lucrative relationships, comprehensive product knowledge and superior client services.

Interpersonal and articulate, able to pursue initiatives that capitalize on strengths and opportunities, and proven to successfully identify and shepherd the process from the first meeting to the closing of transactions.

Excel in management and mentoring of others with an innovative approach that encourages and enables attainment/exceeding of imposed goals and objectives, a collaborative team approach and the desire to succeed.

AREAS OF EXPERTISE

- **Strategic Sales**
- **Business Development**
- **Revenue Generation**
- **Relationship Cultivation**
- **Leadership/Mentoring**
- **Product Information/Management**
- **Global Account Management**
- **Client Presentations/Relations**

PROFESSIONAL HISTORY

Company Name – *City, State*
Vice President ▪ Head of Sales **06/2009 – Present**

- Spearhead growth and sales strategy in XXXX with limited staff of four sales/product specialists with emphasis on low-latency electronic-trading, executable streaming prices (ESP), request-for-quote (RFQ), execution algorithms, price aggregation, white label solutions, and integrate liquidity with third-party partnerships.
- Drive cross-sell, up-sell and net new business to other E-exchange businesses (Currenex, FX Connect, Fund Connect) and the derivative product suites for State Street's D2D and D2C marketplace to complement their #1 ranked XXXXXXX business with $19 trillion AUM as well as their #1 ranked Investment Advisory business with $1.9 trillion assets under management.
- Transitioned 50 personally established Tier I relationships, rebuilt client associations and managed on-boarding, integration and account management efforts with global banks, regional dealers, hedge funds, money managers, proprietary trading, FCM's, and algorithmic trading firms.
- Negotiate contracts and fee sharing agreements between partners, clients and attorneys.

Key Accomplishments

- **Established the sales roadmap and commercial propositio**n that attracted clients to the XXXXX platform consisting of hedge funds, banks, proprietary/algorithmic traders & real money buy-side clients.
- **Exceeded volume goals by 40% monthly, achieved 5-7% market share & met first year revenue of $4mm+.**
- **Increased trading volume for a new Treasury benchmark platform from $0 to $15 billion** within eight months in the aftermath of the historical market downturn and ultra-competitive market space.
- **Secured 100+ accounts** currently on board with a UST trading volume that has exceeded $ 15 billion ADV.
- **Successfully launched the first and only fully electronic T-Bills trading platform** in May 2010.
- **Improved functional requirements** for XXX-based traders leading to increased activity and liquidity.
- **Contracted first Fixed Income clients** for XXXXXXX, which is the #1 in FX in North America.

Company Name – *City, State*
Consulting ▪ Director ▪ Institutional Sales 02/2009 – 05/2009

- Provided strategic consulting, business plans, partnership opportunities and sales execution.
- Introduced approximately 20-25 major Tier I accounts to firm.

PROFESSIONAL HISTORY CONTINUED

Your Company – *City, State*
Vice President ▪ Senior Sales Account Manager 08/2006 – 12/2007

- Jointly defined ecommerce strategy, sales & account management plans primarily focused on rates and financing products with particular concentration on the UST benchmark platform offering.
- Team lead for functional trading requirements GUI/STP/platform design.

Key Accomplishments

- **Escalated client activity 100% and contributed more than 20% to revenues** of $2 million in eight months.
- **Delivered six products in eight months** while managing solution development, sales & marketing.
- **Enhanced platform visibility and introduced key liquidity providers for two product launches**.

Your Company – *City, State*
Vice President ▪ Senior Sales ▪ Account Manager/Major Accounts Team 08/2003 – 08/2006

- Managed total client responsibility and oversight for projects, client strategy, revenue targets, professional services & solutions from pre-sales through delivery. Relationships included: XXX, XXX, XXX, XXX, XXX, and XXX with global coverage of more than 200 traders.

Key Accomplishments

- **Pioneered sales of firm's first multi-asset trading software to clients, resulting in $200M new revenue.**
- **Generated $6 million in revenue and exceeded sales quota by 125%** in 2005/2006.
- **Magnified year over year sales growth by 50%** in 2004, 2005 and through Q3 2006.

Your Company – *City, State* 09/1989 – 08/2003
Financial Advisor ▪ Global Wealth Management – *City, State* 10/2000 – 08/2003

- Prospected and maintained 100 clients with total assets under management of $10 million in the first year.
- Chosen by regional managers to navigate smaller private wealth management clients to the retail platform to better service their overall needs for separately managed accounts, financial planning, insurance products.

Key Accomplishments

- **Achieved top sales in Variable Annuity Sales Nationally for Q1 2003 out of 7000 advisors.**

Senior Sales Associate ▪ Private Wealth Management – *New York, NY* 04/1999 – 10/2000

- Structured product formation, alternative investment selection, execution of trading strategies and portfolio construction for ultra-high net worth individuals and middle market clientele.
- Participated in client meetings and investment selection processes. Collaborated with investment representatives, support divisions and specialty product groups to advise prospective clients on asset allocation mix and portfolio recommendations.

Key Accomplishments

- **Added $500 million to team revenues through coverage of ten middle-market Fixed Income/Equity clients.**
- **Progressed from an initial role of Operations/Liaison (09/1989 – 03/1991) to Associate Vice President, TFI Trader and Desk Manager (03/1991 – 03/1999)** where generation of $10 million annually for five consecutive years, and institution of electronic trading and pre-post trade order management system achieved a 300% improvement in performance, and trade execution was achieved.

EDUCATION **Your University** – *City, State* ▪ **Bachelor of Arts** ▪ Political Science

LICENSES FINRA Series 7 ▪ 63