

EXECUTIVE PROFILE

Marketing, Public Relations, and Communication Professional with twenty years experience across a wide range of disciplines, with a proven track record of reaching beyond the expected to produce real, measurable results. Highly adaptable; identifies and fills needs where they arise. Insightful, intelligent, and creative. A natural leader.

CAREER ACHIEVEMENTS

- Business-to-Business Sales Person: Prospected, qualified, evaluated, proposed and closed client service engagements ranging from \$7,500 to \$60,000.
- Marketing Consultant: Counseled and educated the principals of a fee-only money management firm in growing their managed assets more than 50 percent since November 2005.
- PR / National Spokesperson: served as the national spokesperson for General Electric's national "Men-Do-Laundry Month"--a public relations campaign to promote the launch of GE's Profile Harmony™ Laundry System (now one of the company's flagship lines of consumer appliances).
- Project consultant, developer and ghost-writer: Prospect or Perish, a new curriculum course now published and offered by The American College as part of the Life Underwriter Training Council Fellow and Financial Services Specialist designation programs for professionals in the insurance industry.
- Marketing Director: Created a marketing vehicle where there was none before, that continues to generate between 100-150 qualified leads per mailing, fueling sales and long-term client relationships after ten years in practice.
- Capital Fund Raising: Leveraged current technologies to streamline comprehensive marketing/public relations endeavors for non-profit capital campaigns, cutting costs and overall production time from five months to six to eight weeks; Campaigns raised in excess of \$300 million over ten years.
- Author: Published author before the age of 30. Second book, Don't Wait Until You Graduate! is a strong perennial backlist seller, is now in its Second Edition and has been translated into Chinese for distribution throughout Asia.

PROFESSIONAL ATTRIBUTES

- An expert in all forms of communication media, as a conceptualist, writer (both short and long projects), graphic designer (for print and web), and video producer (subject interviewer, director, scriptwriter, and nonlinear editing).
- Industries served include (but not necessarily limited to) healthcare, building products, fundraising, insurance, securities, financial services, wholesale distribution, social services, arts organizations, nonprofit, higher education, and book publishing.
- An outstanding listener, with tact, humor and sensitivity to other viewpoints.
- Experienced project manager, prudently utilizing time, human and financial resources.
- Highly articulate, with a keen ability to understand complex issues and then convey them succinctly for a wider audience, both in writing and public speaking (before a live audience, on television or on the radio).
- An avid reader, learner, and eagerly seeks new experiences and challenges.

PROFESSIONAL EXPERIENCE

- 2008 - Present **Financial Advisor / Registered Investment Representative** - Principal Financial Group. Dublin, Ohio
Specializing in helping individuals, families and small to medium-sized businesses set and achieve financial goals, leveraging the strong timeless resources of Principal Financial Group.
- 2005 - 2007 **Consultant / Principal** - K&L Resources, Inc.. Columbus, Ohio
Providing counsel and project management services in both human capital development and customer communication programs. Additional services include message/strategy development, planning, copy writing, graphic design (for both print and the web), and video production. Major client accomplishments include (but are not limited to):
- The Joseph Group Capital Management: Periodic consulting services with occasional project management has kept the principals of this firm focused on marketing, prospecting and growing their managed assets more than 50 percent since November 2005.
 - IMPACT Safety: Guided a nonprofit personal safety training organization in redefining itself from a small, reactive safety training workshop provider to a proactive, value-based risk management solutions provider for the greater Columbus corporate community, thus laying the foundation for higher level engagements and value-based fees (In the wake of its new public persona, the demand for service has increased exponentially).
 - Ferris Baker Watts, Inc.: This 80-year old securities firm is relatively new to central Ohio. Created a business development strategy to make the FBW name "part of the landscape" and fuel producers' prospecting and sales activities. Meanwhile, the business development strategy has been copied by other FBW branches.
 - Financial Services Institute, LTD: Lead project consultant, developer and writer of Prospect or Perish, a new curriculum course now published and offered by The American College as part of the LUTCF and FSS designation programs for professionals in the insurance industry.
 - Mooney Financial Services/Society of Registered Securities Professionals: Lead project consultant, developer and co-author (shared byline with Alan K. Mooney) of a new ethics program designed specifically for independent investment representatives (this project is still in progress).
- 1993 - 2005 **Consultant/Creative Director** - Goettler Associates, Inc.. Columbus, Ohio (1993-2003 W-2; 2003-2005 1099) Primary responsibilities included consulting onsite with clients, major donors, and campaign directors in establishing marketing strategies and producing materials for major capital campaigns. This also required the researching and writing of cases for support, executive summaries, program and video scripts, brochures, direct mail letters and other public relations documents. Production of marketing materials included conceptualization, writing, graphic design and print management; video production work involved conducting on-camera interviews; directing on-location videography; assembling various elements into final PR and fund-raising video presentations. All processes required project management of production schedules, managing staff, budgets and client billing. Facilitated the firm's own PR and marketing activities (article placements, marketing materials, direct mail, and website).
- Campaigns raised in excess of \$300 million over ten years.
 - Streamlined the marketing production process for capital campaigns, cutting overall project time from five months to six to eight weeks, and doing more with less.
 - Created a marketing vehicle that generates between 100-150 qualified leads per mailing, and feeds sales after twelve years in production.
 - Leveraged expertise in the latest printing and production technologies to slash production costs and turn-around time of key in-house marketing materials.
 - Initiated and completed total overhaul and reconstruction of company's website.

- 2003 - 2003 **National Spokesperson, GE Publicity Campaign** - Peppercom Strategic Communication. New York, New York
As the author of a highly acclaimed book on husband-wife relationships, and experienced and comfortable in front of a camera and before an audience, selected as the national spokesperson for General Electric's national "Men-Do-Laundry Month" —a public relations campaign conducted in August, 2003 to advance a message of balanced chores in the household, as well promoting GE's Profile Harmony™ integrated laundry system.
- Participated in a satellite media tour based in New York, completing 22 live television interviews with morning talk shows across the country.
 - Also conducted several radio interviews via telephone throughout that month.
 - Media coverage included the picket on Today, featuring Matt Lauer, Katie Couric and Willard Scott.
 - First-week media coverage included USA Today, The New York Times, CNN/Money, CBS Marketwatch and the AOL splash page.
 - Overall media impressions exceeded 700 million.
 - Target-market sales executives report a marked increase in inquiries and sales of the GE Profile Harmony™ laundry system.
 - GE Chief Marketing Officer and Corporate Vice President of Marketing Beth Comstock declared the "National Men Do Laundry Month" campaign a GE Best Practice.
- 1989 - 1993 **Marketing Manager** - Palmer-Donavin Mfg. Co.. Columbus, Ohio
Responsible for all marketing communications, including a 500-plus page multi-brand catalog of building products, corporate advertising, direct mail campaigns, and trade press publicity.
- Converted an antiquated, expensive catalog program into a modern, more cost-efficient system using an integrated combination of spreadsheet, database, word processing, graphics and page-layout solutions.
 - Co-created a 150,000-piece cooperative advertising program with customers that the company continues to operate today, that feeds sales for both the distributor and its customers.

PUBLICATIONS

- *Prospect or Perish: A Success Guide for Financial Services Professionals*. Bryn Mawr, PA: The American College Press, August 2006, 245. (Ghost-written for I. David Cohen). Lead project consultant and ghostwriter for first edition. Prospect or Perish is the textbook for a new curriculum course for the Life Underwriter Training Council Fellow (LUTCF) program at The American College.
- *Don't Wait Until You Graduate II: Jump-start Your Career in Today's Volatile Economy While Still in School*. Far Hills, NJ: New Horizon Press, February 2003, 247. (Second Edition ISBN 0-88282-228-4; Edition-1 ISBN: 0-88282-175-X) New Horizon Press, Far Hills, NJ., 2003. This acclaimed book shows college students how to more effectively position themselves for work when they graduate. It emphasizes what students must focus upon before the job hunt begins, including community service, entrepreneurship, and serving needs in organizations and communities. Adopted by the Ohio State University Arts and Sciences Career Services Department as the primary text for ASC 400A and -B, their career development classes. Translated into Chinese with distribution throughout Asia.
- *Real Foreplay: Eight Easy Steps for the Man Who Wants to Be Closer and More Intimate with His Wife*. Columbus, OH: K&L Resources, Inc. , January 2003, 93. (ISBN 0-9625977-1-6) Written specifically for the man who feels like he is "not getting enough attention at home," this highly acclaimed and steady-selling book defines eight easy steps to becoming a more sensitive and attentive husband, father and domestic partner.
- "The Last Guide to Networking You'll Ever Need." *The Last Guide eBook Series*. Minneapolis, MN: CollegeRecruiter.com; (ISBN: B0000AI11W), March 2004, 50
- "The Last Guide to Finding a Great Internship You'll Ever Need." *The Last Guide eBook*

- Series*. Minneapolis, MN: CollegeRecruiter.com; (ISBN: B0000AERF3), March 2004, 50
- "The Last Guide to Interviewing You'll Ever Need." *The Last Guide eBook Series*. Minneapolis, MN: CollegeRecruiter.com; (ISBN: B0000CBX7G), March 2004, 50
 - "Block Ads." *How Shall They Hear? A Handbook for Religion Communicators, 5th Edition*. New York, New York: Religious Public Relations Council, Inc. (ISBN: 0-9646110-0-7), May 1995. Contributing author on a chapter on do-it-yourself ad layout and composition for groups operating on a tight budget, including effective use of prepared ad kits and clip-art.
 - *Advertise! An Assessment of Fundamentals for Small Business*. Columbus, Ohio: K&L Publications, March 1991, 157. A "nuts & bolts" guide to small business advertising, praised and recommended by national magazines such as ALA Booklist and Library Journal.

SOFTWARE APPLICATIONS

- Adobe: Photoshop, PageMaker, InDesign, Dreamweaver, Freehand
- Microsoft: Word, Excel, Access, Outlook, PowerPoint (Microsoft certified), Project
- Other: Quark-X-Press, WordPerfect, Norton System Works, basic knowledge of HTML, countless others

AWARDS

- VIDEO: Changing Lives: The Salvation Army in the Massachusetts Bay - The Telly Awards. Boston, MA, 1999
- VIDEO: George Washington: To Keep Him First - The Telly Awards. Mount Vernon, VA, 1999
- VIDEO: Strong Values, Strong Leaders: The Anthony Wayne Area Council BSA - The Telly Awards. Fort Wayne, IN, 1998
- VIDEO: An American Voice, A National Treasure: The Campaign for The Mark Twain House - The Telly Awards. Hartford, CT, 1998
- VIDEO: An American Voice, A National Treasure: The Campaign for The Mark Twain House - The Communicator Awards, Crystal Award of Excellence. Hartford, CT, 1998

MEMBERSHIPS

- Institute for Management Consultants, USA
- American Society for Training and Development
- American Marketing Association
- Listed in National Register's Who's Who in Executives and Professionals

EDUCATION

- 2007 **Certificate, Insurance: Life, Accident and Health** - Morton Learning Center. Columbus, Ohio; Ohio Department of Insurance License Number 746771.
- 1991 **B.A., Journalism** - The Ohio State University. Columbus, Ohio
- 1988 **Two-Year Study, Graphic Communication** - The College College of Art & Design. Columbus, Ohio