January 2024

Dear Hiring Team,

With over 25 years of experience in the financial services industry and a proven track record of success, I am confident that I possess the skills and experience necessary to excel in this role.

As you can see from my resume, I have a strong background in sales, coaching, and leadership, with a focus on driving revenue and developing successful teams. After two layoffs in the past year, I am ready to take my career into my own hands and get back to working directly with clients. This is where my passion lies - making an impact on people's lives, so they can realize their goals and dreams.

Over the last decade or so, I led financial services sales team. In my previous role at LPL Financial, I championed the launch of multiple new initiatives, resulting in a 60% increase in revenue year over year. Additionally, I implemented standardized hiring and coaching practices, leading to a 30% increase in close rates. In my position at Nationwide Financial, I co-authored a sales training program and provided ongoing coaching and mentorship to sales leaders and associates, resulting in over $200 million in sales in the first 12 months. I also spearheaded the implementation of automated sales cadences and AI overlays, leading to a 30% increase in sales process efficiencies.

In addition to my sales and leadership experience, I also have a strong background in financial planning and advising. Before joining Jefferson National, I spent 3 years at BoA/Merrill Lynch in the Premier Banking division, working with HNW clients and previous to that, I spent 10+ years with People's Bank building a book of business of financial clients' retirement and investment portfolios along with their banking and lending accounts.

I currently hold my 6, 63, 26, and AZ Life License. I previously held my 65 but Jefferson National couldn't carry it at the time so it lapsed. I am sitting for that exam again on 2/6/24. I would be eager to start the process to obtain my CFP as well.

I am excited about the opportunity to join your established and growing financial firm and contribute my skills and experience to the team. I am a driven, self-motivated, and customer-focused individual, with a strong initiative, positive attitude, and persuasive abilities, as outlined in the job description.

Thank you for considering my application. I look forward to the opportunity to discuss my qualifications further.

Sincerely,

Joena Russell, Registered Corporate Coach™

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Innovative, multifaceted **financial services executive** with 20+ years' experience leading **high performing, tech-centered, dispersed sales teams** to meet and exceed sales objectives while focusing on the financial goals and financial objectives of the end client. Independent and resilient sales professional with **start-up mentality** and the highest levels of **integrity** sets strategies, creates **data-focused, repeatable cadences,** and shepherds execution aimed at **maximizing sales and career successes**. Leverages **world-class leadership skills, coaching and mentorship** prowess and passion for consultative **business development and consulting** to accelerate progress, adjust priorities, and exercise sound judgment across dynamic, matrixed, and **fast-paced** environments. Anticipates obstacles, navigates through ambiguity, proactively and creatively **sources and capitalizes on business development opportunities**, and streamlines processes to meet evolving business needs and global organizational demands.

SKILLS

Sales Skills: Sales and Marketing, Salesforce (crm), Consultative Sales, Automation, Pipeline Management, Social Media Selling, LinkedIn, Seismic, Tableau, Customer Segments, Presentation Skills and Public Speaking, Client Experience, Client Management, Client Relationship Management, Continuous Improvement, Account Management, Highly Motivated, Results Driven, Entrepreneurial, Self Starter

Industry Skills: Series 26, Series 6, Series 63, AZ Life Licensed, Series 65 (Inactive), Fintech, Business Planning, Business Operations, HNW/UHNW Expertise, Business Process, RIAs (Registered Investment Advisor), Broker Dealers, Retirement Planning, Income Planning, Banking, Tax Mitigation Strategies, Mutual Fund, Investments Management, Investment Advisory/Managed Accounts, Financial Planning Foundation, Annuities, Risk Management/Insurance Products, Life Insurance Sales, Mortgages, Lending, Estate Planning, Trusts, Live Events, Ms Office, Excel, Powerpoint, eMoney

Leadership Skills: Registered Corporate Coach™, Start-up sales teams, Recruiting/Staffing, Cross Functional Collaboration, Change Management, Succession Planning

WORK EXPERIENCE

LPL Financial • Remote • 12/2022 - 09/2023
VP, Advisor Institute

- Championed launch of 7 new initiatives including new training courses, professional development events, resource libraries, and Diversity, Equity and Inclusion recruitment programs designed to increase advisors' production and shorten ramp-up time to profitability through practice management.
- Strategized and executed scalable growth plan for a small, start-up team within LPL Business Solutions
- Standardized hiring, onboarding, and coaching cadences, including new leaders of leaders, to maximize engagement, productivity, and revenue growth resulting in a 60% increase in revenue year over year.
- Catapulted Salesforce adoption and implemented capabilities within business unit resulting in 30% increase in close rates.

Nationwide Financial • Scottsdale, AZ - Remote • 08/2018 - 11/2022

Director, Territory Consultants - Advisory Sales

- Co-authored consultative, proactive sales training program, facilitated courses, created playbooks and pitch decks, and held regular ongoing coaching sessions with sales leaders and associates to leverage Salesforce, LinkedIn, and AI programs to uncover and nuture leads, drive sales, and capitalize on and convert new opportunities resulting in over $200 mil in first 12 months.
- Through coaching and mentorship, developed leaders and associates to meet and exceed team's individual and professional goals, fostered multi-location team cohesiveness and engagement, partnered with both external and internal stakeholders, and led utilizing data-focused, proactive consultative sales model resulting in sales growth of 500% in 5 years.
- Partnered with Sales Enablement team to design, develop and implement just-in-time reporting and dashboards for sales associates and leadership resulting in shorter sales cycle time, increased close rates, and increased number of qualified leads from marketing efforts.

Nationwide Financial/Jefferson National • Remote • 07/2014 - 08/2018

Regional Sales Director - Advisory Sales

- Led, coached, and mentored an expanding regional advisory sales team to identify, grow, and nurture sales opportunities through phone sales, virtual, and in-person selling to financial advisors across channels resulting in $1 bil in advisory sales
- Oversaw key RIA relationships, built strategic partnerships with TAMPS, TPIAs, and Aggregators and represented firm as an industry thought leader and resource within the advisory marketplace through training, marketing plans and campaigns, collateral, telephone and webinars, conferences, and other forms of communication.
- Spearheaded implementation plans to launch automated sales cadences, AI overlays, and call metric Salesforce integrations which led to 30% increase in sales process efficiencies.

Jefferson National • 06/2010 - 06/2014

Key Accounts Director Advisory Sales

- Applied research,due diligence, and data analysis results, formulated and documented best practices to identify opportunities and prioritizing engagement activities within large target companies leading to 50% higher penetration rates
- Proactively prospected 300+ large RIA firms nationwide to provide expertise and attention to their unique needs, resulting in record-breaking new assets sales and retention.

Sr Territory Manager - Advisory Sales

Bank of America/Merrill Lynch • Wallingford, CT • 06/2006 - 06/2009

AVP Premier Client Relationship Manager

- Top New Client Acquisition and Client Retention in Northeast

People's Bank • 11/2005 - 05/2006

Financial Services Manager

- Presidents Club Member 2002-2006

EDUCATION

Executive Women's Leadership

Yale University School Of Management

Bachelor in Finance

Southern CT State University

CFP Coursework

Quinnipiac University/University of Northern Texas