

PROFESSIONAL PROFILE

- Strategic thinker with 25 years of consulting, corporate and entrepreneurial experience.
- Communications strategist with proven performance in content-driven strategies for mergers and acquisitions (M&A), capital raises, crises, brand and product launches.
- Past clients include Morgan Stanley, Schroders, Bank of America, Renaissance Capital.

RECENT EXPERIENCE

Independent Consultant – Communications and Marketing – Self-employed – New York*September 2016 – Present*

- Completed more than 30 consulting engagements with innovators in financial technology, asset management, health and wellness (see Addendum below).
- Served as a subadvisor to public relations firms, managing client portfolios with annualized revenues of \$1.6-\$1.9 million. Lead teams of 4-8 people.

Senior Vice President – JConnelly – Financial PR Firm – New York*May 2015 – September 2016*

- Built two high-performance teams managing integrated communications programs for an asset management client portfolio with \$2.4 million in annual revenues.
- Implemented performance-tracking initiatives that improved transparency, profitability and staff utilization.

Independent Consultant – Communications and Marketing – Self-employed – New York*September 2013 – May 2015*

- Led communications and marketing for an investment research and data visualization startup.
- Published independent research and opinion pieces focusing on forensic accounting and corporate governance.

Managing Director – GMI Ratings – Investment Research Firm – New York*January 2012 – September 2013*

- Led marketing and communications following the merger of three businesses focused on Environmental, Social and Governance (ESG) research.
- Increased qualified leads by more than 80% by building a multi-office team of writers, analysts and digital specialists and executing content strategies across U.S. and European media channels.

ADDITIONAL EXPERIENCE (1996 – 2011)

- Progressed to executive leadership roles at PR firms, including Ogilvy, WE Communications, and The Ruder Finn Group (rehired three times).
- Provided investor relations services to anti-virus software vendor McAfee.
- Managed the IR department of Juno Online, the third largest ISP at the time.

EDUCATION

Introduction to Organizational Psychology – Teachers College Columbia University – New York

- Summer of 2003
- GPA: 4.0

Bachelor of Science in Psychology and Sociology – Yeshiva University – New York

- September 1992 to May 1996
- GPA: 3.8

SKILLS

Software

- MS Office
- CRM, Collaboration and Marketing Automation
- Project Management (Trello enthusiast)

Corporate Communications

- *Brand Definition* – Brand Audits, Message Development, Audience Segmentation
- *Brand Expression* – Website Content, Bylines, Annual Reports, Podcasts, Video
- *Stakeholder Engagement* – Digital Strategies, Media Relations, Investor Relations, Crisis Communications, Search Engine Optimization (SEO)
- *Measurement and Evaluation* – Brand Audits, Qualitative and Quantitative Surveys, KPI Dashboards, Social Media Metrics

Foreign Languages

- Russian - Near-native fluency; experience as a licensed Russian-English courtroom interpreter.
- Georgian - Conversational fluency and basic reading and writing skills.

This is a representative list of consulting assignments completed since 2014 for clients, including banks, asset managers, corporate issuers and innovators in financial technology and healthcare.

INNOVATORS: ESG, DATA VISUALIZATION, MICRO-FINANCE, LENDING

Business Launch | Market Entry

- CML VIZ -- Managed communications and marketing for the launch of this data visualization innovator founded by veterans of ESG pioneer GMI Ratings.
- CREDIT BENCHMARK -- Led consulting engagement to help this UK-based data science innovator enter the U.S. market. Positioned the firm's "bank-sourced" credit data as an alternative to the Big Three credit rating agencies (aka NRSROs).

Repositioning | M&A

- CROSS RIVER BANK -- Executed a contributed content campaign for the CEO to support the firm's transition from a consumer bank to a highly regarded innovator in marketplace lending.
- MILLENNIUM TRUST -- Led broad-ranging engagement encompassing corporate positioning, event marketing, branding and the acquisition of the business by Parthenon Capital.

Cause-driven Media Relations

- FINCA INTERNATIONAL -- Completed a pro bono media relations campaign for this network of 20 microfinance institutions and banks worldwide.

BROKERAGE, BANKING & FINTECH

Research | Analytics

- MORGAN STANLEY -- Completed peer-group audit for the firm's technology organization gauging dominant themes in media coverage and corporate content focused on systemically disruptive innovations, particularly Artificial Intelligence (AI), blockchain and cryptocurrency, cybersecurity and cloud computing.

Corporate Positioning | Content Strategies | Product Launches

- ALTO -- Served as Senior Director of Content for this provider of self-directed IRA for investors in alternative assets.
- LADENBURG THALMANN -- Led broad-ranging engagement encompassing corporate positioning, M&A, event marketing, branding and the launch of the award-winning \$ymbol robo-advisor platform.

ASSET MANAGEMENT & WEALTH ADVISORY

Media Relations | Fund Launches

- SCHRODERS -- Led agency team responsible for the North American earned-media strategy for this global asset management company. Generated extensive on-message coverage of several strategies -- including equity, fixed income, emerging markets, multi-asset, ESG, insurance-linked securities -- and the 2016 International Media Day.
- SCHULTZE ASSET MANAGEMENT -- Led agency team responsible for the earned-media strategy for this hedge fund with \$500 million in AUM specializing in distressed assets and special situations.
- ADVISORS ASSET MANAGEMENT -- Led agency team responsible for the brand audit and earned-media strategy for this distribution platform with annual asset sales of more than \$15 billion.

Infrastructure Finance | Fundraising | Legislative Proposal

- AIRNET-21 -- Co-led message development, digital strategies and media relations for this legislative proposal for a \$30 billion sustainable funding source for Northeast Corridor transportation infrastructure.

Media Relations | M&A | Crisis Communications

- FIDUCIARY TRUST -- Managed communications for the appointment of the new CEO. Led the earned-media strategy targeting sustainability-minded clients.
- TRUINDEPENDENCE -- Led agency team responsible for the earned-media strategy for this premier consultancy for investment professionals seeking to launch independent firms.

ETF STRATEGISTS & CORPORATE ISSUERS

Corporate Positioning | Transaction Communications

- EMERGING GLOBAL ADVISORS -- Led agency team responsible for the earned-media strategy for this provider of strategic beta portfolios in emerging markets with about \$1 billion in AUM. Managed communications for the firm's acquisition by Columbia Threadneedle.
- CEDAR CAPITAL and GOOD HARBOR FINANCIAL -- Led agency team responsible for broad-ranging engagement encompassing corporate positioning, the earned media strategy and transaction communications for this ETF strategist's acquisition of the assets of F-Squared Investments.
- EXCEED INVESTMENTS -- Led agency team responsible for the earned-media strategy for this innovator in defined-outcome investing, an investment discipline which shapes the potential outcomes of an existing index or security to fit pre-set protection and return levels.

Media Relations | Market Entry

- ETF SECURITIES -- Led earned-media strategy in support of the firm's entry into the U.S. market.
- REALITY SHARES -- Led earned-media strategy for this ETF issuer and index provider.

CORPORATE INVESTOR RELATIONS (IR)

- DORIAN LPG (NYSE: LPG) -- Led earned-media strategy for this liquefied petroleum gas shipping company focusing on IMO 2020 maritime fuel emission standards.
- MELLANOX TECHNOLOGIES (NASDAQ: MLNX) -- Helped organize two Investor Day events for this multinational supplier of computer networking products.