

MARKETING & DIGITAL COMMUNICATIONS STRATEGIST –

Accomplished marketing communications and Internet strategist for Merrill Lynch. Extensive experience creating and deploying innovative strategies and solutions in tight, deadline-driven and cost-conscious environments. A leader in championing the integration of the Internet into an organization's overall strategic vision.

COMPETENCIES:

BUSINESS PLANS: Conceive, design, deliver strategic and tactical plans for wide variety of needs.

WRITING and EDITORIAL: Superior writing, editorial, layout skills for creating newsletters, marketing & web content.

WEB-BASED MARKETING COMMUNICATIONS: Proficiency leveraging and integrating corporate Intranet and Internet channels into marketing campaigns, conferences, sponsorships and sales force education initiatives. Adapt and convert existing collateral materials for online access. Expertise using Adobe Acrobat (creating & managing pdf files), Microsoft Office, streaming media, web browsing and web publishing software. Strong Internet research skills.

STRATEGIC ALLIANCES and PARTNERSHIPS: Collaborate, cultivate internal/external strategic partnerships and alliances. Experience outsourcing, negotiating and managing external vendor relationships.

SIGNIFICANT CAREER ACCOMPLISHMENTS:

2001: Delivered new philanthropy destination on Merrill Lynch's public (AskMerrill) website. Negotiated and partnered with senior marketing colleagues, industry leaders and external PR firm to create strategic alliances and techniques for delivering innovative, custom content to coincide with business unit's public launch. Created unique website address to drive firm's branding and media outreach efforts to make site a key destination in nonprofit community for philanthropic news, education and tools.

2001: Selected by senior management to serve as major contributor of special, cross-functional team. Goal: create and deliver comprehensive, cost-effective plan for branding and introducing Merrill Lynch's philanthropic services group as a leading nationwide provider of philanthropic planning services for individuals and nonprofit organizations.

1997: Partnered with MSNBC's Internet Business Video Network to produce interactive online seminar, featuring streaming audio and video before a live studio audience at the former World Trade Center in NY. Event attracted largest number of participants to date for this type of seminar at Merrill Lynch & MSNBC. Managed event PR, including writing of promotional copy and online creatives. Directed setup and guidelines for soliciting questions from live audience. Event received extensive press coverage.

EXPERIENCE TIMELINE:

2001 to 2002 **MANAGER, e-STRATEGIES & SOLUTIONS**

The Merrill Lynch Center for Philanthropy & Nonprofit Management **Merrill Lynch Wealth Management Services, Princeton, New Jersey**

Developed integrated digital marketing communications vision and strategies for delivering philanthropic and wealth management services to prospects, clients and sales force. Identified best practices, metrics, strategic partners and vendors to create and deploy B2C initiatives.

RESULTS:

- Created plan for web-based newsletter, delivering highly actionable and sophisticated philanthropic sales strategies and tools for top 2% of firm's 15,000 financial advisors.
- Delivered series of targeted teleconferences to Merrill Lynch's 600+ retail offices. Less than \$1,000 per show -- events provided cost-effective, productive climate for Merrill Lynch, external advisors and American Cancer Society (ACS) Gift Planning Officers to network and learn about latest legislation and techniques mutually beneficial to each group's sales objectives. This included nationwide expansion of firm's charitable gift annuity business with ACS.

1998 to 2001 e-MARKETING COMMUNICATIONS MANAGER
Merrill Lynch Trust Company/Nonprofit & Philanthropic Financial Services,
Merrill Lynch Wealth Management Services, Princeton, New Jersey

Identified, managed, communicated and delivered segment- and channel-appropriate web-based services and solutions to internal sales force, general employee population, prospects and clients.

RESULTS:

- Secured services of prominent NYC consulting firm to create online, searchable database of personal profiles for Merrill Lynch Trust Company's sales professionals. Successfully negotiated below market rate at a time of rapidly escalating costs due to nationwide consultant shortage.
- Coordinated regularly televised media outreach appearances for management team members on closed-circuit daily news show for sales force.
- Worked with media services group to create high-end, professionally-designed and branded presentation templates and CD-ROMs for consulting team, management and sales force use in client meetings, seminars and conferences.
- Received President's Award (1999) for role in communicating and implementing new pricing and sales force compensation guidelines for Merrill Lynch Trust Company.

1997 to 1998 e-MARKETING COMMUNICATIONS ASSOCIATE
Merrill Lynch Next Generation Marketing, Princeton, New Jersey

Collaborated on all Internet marketing activities for new business unit focusing on tech-savvy, wealthy young investors aged 25-44.

RESULTS:

- Used Internet as key channel for educating public on changes affecting Individual Retirement Accounts as introduced through 1997 Taxpayer Relief Act. Achieved through creation of special "IRA Center" on firm's public website. Produced online financial seminars, wrote marketing and promotional copy and collaborated on banner advertisements and special keyword buys on major online portals to heighten interest in IRAs and generate investor traffic to special site.

1990 to 1997 EDITOR & COMMUNICATIONS SPECIALIST
Merrill Lynch National Services, Somerset, New Jersey

Managed, edited and authored print and online editions of Service Management Weekly — a firmwide client service information and support publication.

RESULTS:

- 1994-1996: Edited, managed, authored division-wide newsletter for 2,500 employees supporting group's United Way fund raising efforts. Realized 50% in cost savings over previous campaigns by utilizing in-house publishing facilities. Recipient of special achievement award all 3 years for contributions to firm's responsible citizenship core principle.
- Internal semi-annual survey consistently ranked Service Management Weekly as number one internal publication for content accuracy, information timeliness and format.

EDUCATION: *Bachelor of Business Administration – Marketing Management (BBA)*
Bernard M. Baruch College, New York City

PROFESSIONAL CREDENTIALS: *Series 7 and Series 63 Registered Securities Representative.*

AFFILIATIONS: *Member: (CCPA) Chamber of Commerce Princeton (N.J.) Area*