

# **Jane Smith, MBA**

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Enthusiastic and client-oriented marketing professional with a proven record of accomplishments in various marketing roles, supporting business goals and objectives. Expertise in directing the creation of marketing tools and steering the execution of marketing programs. Results-driven team player accustomed to managing multiple projects in fast-paced environments.

## **PROFESSIONAL EXPERTISE**

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- Adept at communicating with senior executives, management, vendors, and internal departments to co-ordinate overall marketing efforts
- Proficient in organizing, implementing and managing events, seminars and conferences
- Highly creative with expertise in communications, branding and internal marketing materials
- Strong team player/leader who excels in maintaining productive relationships with staff, peers, clients and management
- Skilled strategist with a proven track record of transforming operating plans into successful results

## **CAREER HISTORY**

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### **FINANCIAL ADVISORY SERVICES LTD. - WINNIPEG**

2008 – present

*Independent financial planning firm with investment strategies including mutual funds, money markets, stocks, portfolio funds and GICs – assets under management total \$230M Canadian.*

#### **Program Delivery Consultant (Sept. 2010 - present)**

- Managed the delivery, development and promotion of various educational events and marketing programs for a financial company of approximately 1000 advisors and assistants.
- Developed and managed a wide range of marketing collateral, including promotional materials, direct-mail pieces and website content.
- Managed key internal and external relationships ensuring programs met company objectives and operated within budget parameters.

#### **Key accomplishments:**

- Successfully managed, delivered and promoted a National Sales Conference for approximately 600, various national road shows, educational meetings and events
- Proposed and launched a reward and recognition program for sales team and support staff
- Effectively negotiated contracts with vendors to save company over \$300,000
- Managed events budget of over \$2 million per year

#### **Senior Marketing Coordinator (2008 - 2010)**

- Received, tracked and evaluated advisor's marketing collateral to ensure that branding standards and regulatory guidelines were adhered to.
- Ensured advisors were educated to the standards and assisted in revisions of material if necessary.

**Key accomplishments:**

- Created database for efficient tracking and reporting, and organized compliance operation increasing efficiencies and reducing labour costs
- Initiated the creation of a departmental process and policy guide for training and development; decreased training time by two weeks and increased retention rates for key personnel by 8% annually
- Participated in interviewing and selecting over 10 new hires within the department
- Received Employee Recognition Award in 2005 for contributions in Brand Management and Advertising department

**SHELTER CANADIAN PROPERTIES – CALGARY**

2006 - 2008

*The overall objective of the company is to provide its clients with excellent investment opportunities which are supported by comprehensive fee and asset management services.*

**Mortgage Client Representative**

- Demonstrated a high standard of professionalism when dealing with phone and e-mail inquiries from clients, consultants and other individuals pertaining to mortgages.
- Served as a liaison with internal groups in a time sensitive atmosphere.
- Worked with a team on projects related to the startup of a new division.

**Key accomplishments:**

- Demonstrated immediate talents upon hire and excelled quickly to become recognized by management as key member of team
- Hand picked to be part of a team to assist in the integration of back office systems when division was transferred
- Recipient of the Employee Incentive Plan for outstanding performance two years in a row - 2003 and 2004

**EDUCATION & PROFESSIONAL DEVELOPMENT**

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**Master of Business Administration** – Marketing  
Asper School of Business, University of Manitoba

2012

**Canadian Securities Course**  
Canadian Securities Institute

2008

**Investment Funds Operations Course**  
Investment Funds Institute of Canada

2008

**Bachelor of Arts Degree**  
Business Administration, Marketing - University of Winnipeg

2007

**VOLUNTEER AND COMMUNITY INVOLVEMENT**

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Winnipeg Humane Society – Volunteer  
Toastmasters Club

October 2009 - present  
September 2007 - present

Asper MBA Student Association  
Canadian Cancer Society, Calgary – Volunteer

January 2011 - present  
2008

Terry Fox Foundation – Volunteer and participant

2007/2008