JOHN DOE
Head of Strategic Partnerships

Strategic Growth & Distribution Leader
Architect of Scalable Sales Engines, Trusted Partnerships & Market Expansion
Generated $20B+ in Annual Sales | Grew Market Share by 400% in 18 Months

One of the Financial Services Industry's Foremost Experts in Strategic Distribution & Alternative Investment Partnerships

Mid- to Large-Scale Financial Services Firms, Including PE-Backed, Fintech, and Insurance Leaders Focused on Growth

P&L Oversight of $5M | Top-Line Revenue > $20B | National Leadership of 200+ Staff | Deep Enterprise & Partner Alignment
Handpicked by Executive Leadership to Spearhead Strategic Growth, Partner Negotiation & Cross-Enterprise Distribution Strategy.

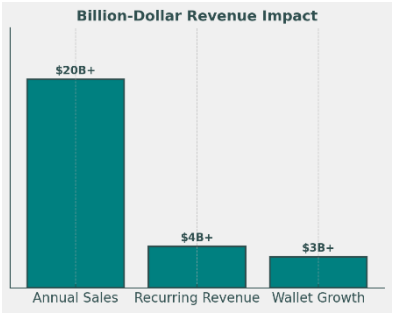
Strategic Growth Leader | Enterprise Relationship Builder | Strategic Revenue Driver | Distribution & Client Engagement Expert

Highly accomplished, data-driven, and impact-focused distribution executive with 20+ years of progressive experience scaling multibillion-dollar platforms across insurance, alternatives, and fintech, and fintech. Adept at engineering national go-to-market strategies, optimizing partner economics, and aligning cross-functional teams for enterprise growth. Specialized in combining sharp commercial instincts with a high-trust, relationship-first leadership style that earns C-suite and PE buy-in. Adept at transforming fragmented sales environments into high-performing engines through GTM design and channel optimization. A transformational and customer-centric leader with operational clarity, financial rigor, and calm authority that drives results.

You don't have to choose between scale and trust. Sustainable growth begins with integrity, alignment, and people.

SELECTED BENCHMARK PERFORMANCES

- ✓ **Grew market share from 1% to 5% and expanded topline sales from $500M to $2.5B within 18 months** by spearheading an enterprise-wide sales strategy.
- ✓ **Generated $4B+ in new annual recurring revenue** across insurance and alternatives by closing and activating strategic partnerships.
- ✓ **Improved profitability by $500K+ annually** through partner renegotiations across six key institutional relationships.
- ✓ **Unlocked access to a $100B market opportunity** and positioned the firm for 50%+ revenue growth by co-leading GTM alignment with BCG and KKR.



EXECUTIVE CORE COMPETENCIES

- ✓ Strategic Distribution Leadership
- ✓ Partner Acquisition & Channel Growth
- ✓ P&L Ownership & Revenue Expansion
- ✓ Customer-Centric Innovation
- ✓ National Sales Team Development
- ✓ C-Suite Stakeholder Engagement
- ✓ Cross-Functional Team Alignment
- ✓ Business Transformation
- ✓ Enterprise Go-to-Market Strategy
- ✓ Client Relationship Management
- ✓ Strategic Partnership Negotiation
- ✓ Process Improvement Initiatives

EXECUTIVE CAREER HISTORY & HIGHLIGHTS

Global Company ● Location ● 2019 – Present

With $665M in revenue and 3.6k+ employees, it delivers tailored retirement and life insurance solutions across the U.S. Recognized for its institutional strength and client-focused innovation in the annuity and life markets.

Head of Strategic Partnerships and Independent Distribution — 2021 – Present

Scope: $20B Distribution Volume | $5M Budget | Team Size: 100 | Reported to: CEO

Selected to architect and scale a high-impact distribution model that deepens institutional relationships, unlocks access to emerging channels, and accelerates sales across insurance and alternative products. Lead national partner strategy spanning wirehouses, IMOs, and fintech ecosystems.

- ✓ **Multiplied market share fivefold and increased annual sales from $500M to $2.5B within 18 months** by redesigning national distribution strategy, targeting underpenetrated segments, and retooling frontline execution across enterprise growth levers.
- ✓ **Positioned the firm to access a $100B revenue opportunity** by co-leading a system-wide strategic initiative with BCG, while aligning executive vision with field strategy and partner activation roadmaps.
- ✓ **Grew wallet share by $3B across top 10 partners within 12 months** by activating a structured C-suite engagement playbook, surfacing whitespace in product mix, and embedding enterprise co-selling strategies.

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Head of Strategic Partnerships — 2019 – 2021

Scope: $4B+ Annual Recurring Sales, National Client Portfolio | Budget: $15M | Team Size: 80 | Reported to: CEO

Recruited to build a partner-driven enterprise distribution model to drive long-term sales growth, deepen institutional alignment, and enhance bottom-line profitability.

- ✓ **Unified enterprise functions, such as sales, marketing, operations, and technology** by establishing a go-to-market task force, enabling coordinated partner launches, and creating a foundation for a long-term GTM model adopted across the business.
- ✓ **Optimized delivery and retention across national accounts** by integrating customer voice into enterprise functions and instilling partner insights into product development, marketing, legal, and compliance workflows.

Financial Distributors • Location • 2008 – 2018

With $246M in revenue and 800+ employees, it serves as the wholesale distribution arm of Lincoln Financial Group.

Head of Strategic Partner Relationship Management and Enterprise Business Development — 2016 – 2018

Scope: Multichannel National Accounts | Budget: $10M | Team Size: 20 | Reported to: CEO

Promoted to oversee enterprise business development strategy for Lincoln's largest institutional partners across bank, wirehouse, and independent channels.

- ✓ **Preserved 100% of shelf space across all priority institutional accounts** by aligning Lincoln's product roadmap with client-level risk, regulatory, and distribution concerns during a volatile compliance cycle.
- ✓ **Grew partner engagement beyond national decision-makers** by creating an enterprise-wide coverage model that extended relationship ownership to local markets for stronger account influence.

Head Of Enterprise Business Development — 2008 – 2016

Scope: Multi-Line Distribution Strategy | Budget: $5M | Team Size: 10 | Reported to: CEO

Chosen to lead a CEO-backed initiative to redefine enterprise sales strategy, create a modern distribution model from the ground up, develop a high-impact team, and capitalize on incremental revenue growth across core product lines.

- ✓ **Delivered 10% ROI in year one and exceeded 15% ROI annually thereafter** by developing and executing a new distribution model across retirement, estate, wealth transfer, and protection products.
- ✓ **Revived growth across the four highest-revenue partners** by launching a pilot in the wirehouse channel that integrated annuities, mutual funds, LTC, life insurance, and group benefits into a unified distribution model.
- ✓ **Realized 60% of total firm sales across five business lines** by maximizing performance and channel coordination within Morgan Stanley, LPL, Merrill Lynch, and other top-tier partners.

SEI Investments: SEI Investments Distribution Company (SIDCO) • Oaks, PA • 2003 – 2008

Part of SEI Investments ($2.13B revenue, 5k+ employees), it operates as a FINRA-registered broker-dealer.

Institutional Sales and Relationship Manager

Scope: $1B+ Institutional Assets | Budget: $500K | Team Size: 10 | Reported to: Director

Appointed to expand SEI's institutional footprint by penetrating underdeveloped markets and delivering tailored investment solutions to high-potential client segments.

- ✓ **Closed $800M+ in new institutional assets within two years** by targeting decision makers across banks, pensions, RIAs, and foundations, and positioning SEI as a full-service outsourcing partner.
- ✓ **Grew assets by $350M in the private banking and trust unit** by capitalizing on cross-sell synergies with investment management and transactional flow solutions.

EDUCATION & CREDENTIALS

ABC University, Philadelphia, PA
Master of Business Administration, Finance & Management
Bachelor of Arts, Accounting

Professional Development: **Executive Leadership Program | Certified Financial Planner – 7 Modules Completed**