

Valerie A. Lee, M.S.



Cell Phone: 925-448-7983

LinkedIn Profile: <http://www.linkedin.com/in/valeriealee>

E-Mail: valalee.ms@gmail.com Web: www.valeriealee.com

PROFESSIONAL EXPERIENCE

Charles Schwab & Co., San Francisco, CA

Financial Consultant Partner (Series 7 and 66 licensed employee) November 2014 – October 2018

- Cultivated strong relationships with prospects and clients to drive business and deeper engagement
- Generated new business development opportunities for Senior Financial Consultant
- Created and presented financial plans, portfolio reviews and investment recommendations
- Strengthened and retained client relationships by providing retirement and investment guidance
- Developed relationships with clients by helping them meet their financial and retirement goals

Fidelity Investments, Walnut Creek, CA

Regional Relationship Manager (Series 7 and 66 licensed employee) January 2014 – November 2014

- Set up targeted appointments to drive new business and deeper engagement with clients
- Ranked #1 nationwide for appointment generation with high-net-worth clients
- Strengthened relationships with high-net-worth clients (\$1 million+ in investible assets)
- Generated new business opportunities for Account Executives in San Francisco Bay Area

Morgan Stanley, Honolulu, HI

Financial Advisor (Series 7 and 66 licensed employee) May 2012 – January 2014

- Developed a wide range of marketing content around retirement plan selection and implementation
- Conducted discovery interviews with C-level executives to understand their financial goals
- Created and delivered sales presentations to companies with at least \$1 million in investible assets
- Ranked in the top 20% in nationwide cohort for assets under management

Kaiser Permanente, Oakland, CA

National Proposal Consultant January 2009 – April 2012

- Designed marketing strategies and programs to strengthen relationships with institutional clients
- Wrote marketing and educational content for Kaiser Permanente's digital channels (email, web, etc.)
- Developed marketing communications programs and positioning to promote health care services
- Created dashboards and published results of key RFP (Request for Proposal) performance indicators
- Created, developed and presented RFP process efficiency tools at major regional conference

Lumetra, San Francisco, CA

Senior Marketing Communications Consultant October 2007 – August 2008

- Created marketing content for nursing homes, home health agencies and hospitals in California
- Developed and managed integrated marketing communication programs for healthcare providers
- Captured results of marketing and content initiatives to highlight results to senior management
- Led target audience research project on communication preferences among healthcare audiences

Wells Fargo, San Francisco, CA

Marketing Consultant 2, Wells Fargo Financial Products August 2005 – October 2007

- Developed positioning for new financial products and platforms in collaboration with product teams
- Developed and executed integrated marketing plans, collaborating with product and sales teams
- Created marketing and educational content using wide range of print and online channels
- Developed and implemented marketing communications, sales, and brand development strategies
- Wrote commentary and analyzed data for three weekly e-newsletters

Project Manager 1, Wells Fargo Private Client Services (PCS) April 2004 – August 2005

- Managed marketing and content development process for major Wells Fargo PCS initiatives
- Created internal and external marketing collateral and sales materials for Wells Fargo PCS
- Helped create and implement new Wells Fargo PCS National Sales Advisory Desk
- Created, implemented, and executed first national PCS Wealth Management Conference

Personal Banker, Wells Fargo Bank November 2003 – March 2004

- Sold financial, credit, mortgage, and investment products and services
- Managed portfolios, serviced relationships, and cross-sold financial and banking products
- Identified investment, consumer, and lending opportunities among high-value retail customers

EDUCATION

- Master of Science in Marketing (High Honors), Golden Gate University, San Francisco, CA
- Bachelor of Arts in English (minor in Journalism), Indiana University, Bloomington, IN