Valerie A. Lee, M.S.

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PROFESSIONAL EXPERIENCE

Charles Schwab & Co., San Francisco, CA
Financial Consultant Partner — November 2014 – Present

- Develop relationships with Pinnacle clients ($1 million+ in assets)
- Set up targeted appointments to drive deeper engagement with clients
- Generate new business opportunities for Senior Financial Consultant

Fidelity Investments, Walnut Creek, CA
Regional Relationship Manager — January 2014 – November 2014

- Developed relationships with high-net-worth clients ($1 million+ in investible assets)
- Set up targeted appointments to drive deeper engagement with clients
- Generated new business opportunities for Account Executives in Walnut Creek, Dublin, Berkeley, Burlingame, San Francisco, and Larkspur, CA
- Ranked #1 nationwide for appointment generation with high-net-worth clients

Morgan Stanley, Honolulu, HI
Financial Advisor — May 2012 – January 2014

- Developed new business via cold calling, direct mail, networking, referrals, and seminars
- Conducted discovery interviews with high-net-worth prospects to understand their financial needs, goals, investment preferences, risk profile, time horizon, and liquidity needs
- Created and delivered marketing and sales presentations to high-net-worth prospects and clients
- Ranked in the top 20% in nationwide training class for assets under management

Kaiser Permanente, Oakland, CA
National Proposal Consultant — January 2009 – April 2012

- Wrote marketing and sales content for Kaiser Permanente's digital channels (email, web, etc.)
- Developed and communicated market positioning of Kaiser Permanente by differentiating, branding, and promoting products and services
- Created, developed and presented RFP process efficiency tools at regional conference

Lumetra, San Francisco, CA
Senior Marketing Communications Consultant — October 2007 – August 2008

- Developed and managed marketing communication strategies for healthcare providers in nursing homes, home health agencies, and hospitals in California
- Developed, managed and implemented strategic marketing communication plans for a nonprofit healthcare consulting firm
- Led target audience research project on communication preferences among healthcare audiences

Wells Fargo, San Francisco, CA
Marketing Consultant, Wells Fargo August 2005 – October 2007

- Created, developed, and implemented marketing, sales, and brand development strategies for fixed income, commodities, and equity departments at Wells Fargo
- Wrote commentary and produced three weekly e-newsletters focusing on equities, fixed income instruments, commodities, the economy, and the interest rate environment
- Partnered with subject matter experts to create and execute marketing programs for institutional audiences using print and online channels (web content, brochures, direct mail and email campaigns, advertising, newsletters, and presentations)

Project Manager April 2004 – August 2005

- Created internal and external marketing communications and sales materials
- Created, implemented, and executed first national PCS Wealth Management Conference
- Helped create and implement new Wells Fargo PCS National Sales Advisory Desk

Licensed Personal Banker November 2003 – March 2004

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

Morgan Stanley, Honolulu, HI
Financial Advisor October 2000 – October 2003

- Developed new business via marketing, seminars, direct mail, advertising, and networking
- Ranked in the top 20% in nationwide training class for assets under management

RELATED EXPERIENCE

Teachers Insurance and Annuity Association
College Retirement Equities Fund (TIAA-CREF), San Francisco, CA 1990 – 1991
Participant Counselor

- Marketed mutual funds and annuities to college and university professors and administrators
- Recommended and facilitated new purchases and ongoing participation

Merrill Lynch, San Francisco, CA 1987 – 1990
Financial Consultant

- Identified new business opportunities, developed business solutions, and sold financial products
- Ranked in the top 20% in nationwide training class for assets under management

EDUCATION AND LICENSES

- 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
- Series 7, Series 66, California Life and Health insurance licenses
- Executive Certificate in Financial Planning, San Francisco State University, San Francisco, CA