Karie Evans

24875 Vista Magnifica Laguna Niguel, CA 92677

949.636.5964 . karieevans.ke@gmail.com Creative Portfolio: karieevans.com

Profile

In-house marketing creative looking to utilize and expand extensive skillset, including strategy development and problem solving, to increase brand awareness and profitability for clients. Proven track record of increasing brand awareness, digital marketing strategies, content creation (written and graphic) short and long-term marketing campaigns, as well as internal marketing.

Experience

# Compak Asset Management

2022-current

*Marketing Operations Executive*

* Responsibilities spearheading local, regional, and national brand and marketing campaigns for wealth management firm utilizing traditional and digital marketing techniques
* Working closely with vendors, as well as high net worth clients on events, both online and in person
* Market research and trend analysis resulting in lower marketing costs and increased market presence
* Collaborate with account managers and senior staff to prioritize marketing priorities, strategy planning, and budget goals
* Content creation across all mediums - print, media, social media, video, ads, website, events including presentations, video scripts, podcast outlines, flyers, invitations, social media posts, emails, etc.
* Brand upgrade featuring consistent messaging, color story, and company goals
* Maintain WordPress website
* Quarterly in-house marketing presentations to over 20 people
* Create PowerPoint presentations, webinar presentations
* Event coordination – client events, seminars, webinars, online webinars
* Project Management – supervise all marketing projects utilizing PM software
* Video Producer – pre and post production editing utilizing Adobe Premiere, writing and filming weekly, monthly, and quarterly production segments
* Podcast Producer – weekly podcast production from technical to guest booking
* Internal communications between supervisory and staff departments

# Align Wealth Advisors

2019-2021

*Director of Business Development*

* Lead development and execution of direct and passive marketing systems
* Created Succession and Acquisition program to meet both short and long-term growth goals
* Fostered COI relationships through LinkedIn Marketing program utilizing Sales Navigator
* Created several growth programs including KidsFUNance Children’s Financial Literacy Program, Road 2 Tomorrow College Planning, BigPicture Financial Planning Masterclass, NestEgg Legacy Planning Masterclass, and Succession/M&A Structure.
* Event coordination – client events, seminars, webinars
* Social media management (Facebook, Instagram, LinkedIn)
* Built and maintain WordPress website, including all content creation
* Create PowerPoint presentations, webinar presentations
* Content creation and graphic design for every aspect of company – websites, advertising, signage, décor, books
* Create and maintain all media – press releases, brochures, television and commercial scripts

*Operations Specialist*

* Client onboarding
* Manage existing client accounts
* New account openings – client meetings, paperwork, follow-up, maintenance for annuities, advisory, life insurance, long term care
* Work with vendors to ensure smooth transition during onboarding
* Beneficiary updates and tracking
* Review tracking and preparation – reports, client packages, create review notes, follow-up
* Maintain Redtail CRM – data entry, update, contact reports, scheduling, seminar invites and tracking, calendar tracking
* Quarterly RIA Billing – reports, tracking, invoicing, collection
* Manage and maintain Albridge performance reporting – reports, client data, new accounts
* Managed RMDs for all clients – tracking, reporting, distributions, scheduling, SPOs
* Broker dealer monthly attestations for performance reports, correspondence, gifts, etc.
* Firm compliance – firm element, regulatory element, insurance licenses, securities licenses, sexual harassment, internal training
* FINRA compliance ADV and WSP
* Compilation of quarterly market reports
* Product and vendor research – annuities, mutual funds, 529s, etc.

# WCCS

2009-2019

*Marketing and Operations Manager*

* Collaboratively design and develop site content and design
* Generate and publish engaging content and ensure brand consistency
* Design, production and distribution of print materials such as brochures, ads, exposes, direct mail campaigns and press releases
* Design, production and maintenance of all ads, content, post, videos, newsletters, and SEO on social media and digital marketing platforms like Google ads, Instagram, Linkedin, Facebook, Twitter, and YouTube.
* Optimize content according to SEO
* Use content management systems to analyze website traffic and user metrics
* Increase web traffic across platforms by managing content distribution to online channels and social media
* New account paperwork, opening accounts, maintaining client files
* Securing financing for clients at auto dealership
* Work directly with clients to determine loan viability
* Amortizing and servicing loans
* Manage office staff 2-4 employees

# Woodwork Creations

2004-2008

*Designer*

* Design custom cabinetry for residential and commercial accounts
* Utilize CAD-based solid modeling software to create virtual designs and cut list for CDC machine cutting
* Meet with clients on-site, measurements, on-site design, sales, service
* Supervise installation crew during product installation
* Liase with customer service to mitigate design and/or installation issues

Skills

* Microsoft Office Suite – including PowerPoint, Excel, and Access
* Adobe Creative Cloud Suite – including Illustrator, Photoshop, InDesign
* Asana Project Management Software
* Redtail CRM
* Salesforce CRM
* CAD Design Software
* QuickBooks
* Copywriting
* Ghostwriting
* Copyediting
* Freelance Writing
* Published Author – Lightbringer (Novel), My Bible Sketchbook (Children’s Sketchbook), Financial Survivor Handbook (co-author), A Woman’s Sword (Historical Fiction), The Wisp Book (Children’s Book), The Wisp Book: Wimzee Goes International (Children’s Book)

Education

California State University Fullerton, 2007 BA History

BA English

Licenses

State of California

License 0I70266

* + Variable Contracts
	+ Life-Only
	+ Accident & Health
	+ Property & Casualty

Series 6 (Inactive)

Series 63 (Inactive) Series 7 (in process)

LinkedIn Asana Certificate

REFERENCES AVAILABLE UPON REQUEST