

Karie Evans

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[Creative Portfolio: karieevans.com](http://CreativePortfolio:karieevans.com)

Profile

My approach to business is multi-faceted in concept, multi-pronged in operation, and hands-on in execution. I have a diverse range of experience and talents that I bring to every position. I am innovative, creative, detail-oriented, motivated, and accurate. Developing systems is a top priority for me and generally makes any working environment function in an efficient and accountable way.

Experience

Compak Asset Management 2022

Marketing Operations Executive

- Responsibilities Spearheading local, regional, and national marketing campaigns for wealth management firm
- Working closely with vendors, as well as high net worth clients on events, both online and in person
- Content creation across all mediums - print, media, social media, website, events
- Maintain WordPress website
- Create PowerPoint presentations, webinar presentations
- Event coordination – client events, seminars, webinars
- Video – post production editing utilizing Adobe Premiere

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 users 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 and Access
- Adobe Creative Cloud Suite – including Illustrator, Photoshop, InDesign
- Redtail CRM
- CAD Design Software
- QuickBooks
- Copywriting
- Ghostwriting
- Copyediting
- Freelance Writing
- Published Author – 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 0170266

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

Series 6 (Inactive)

Series 63 (Inactive)

Series 7 (in process)

REFERENCES AVAILABLE UPON REQUEST