Jacqueline Howard, CLU, ChFC

Portfolio & References: www.JacquelineHoward.com | eMail: Jacqueline@JacquelineHoward.com
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SUMMARY OF QUALIFICATIONS:

- Excellent writing, marketing and communication skills
- Leadership, project management, multi-tasking and organizational skills
- Well-versed, educated and experienced in financial, retirement, protection, estate, business/executive, tax and investment planning, participant and plan sponsor marketing and communications
- Diverse financial services product knowledge, including life insurance, investments and retirement

FINRA Licensing: Series 6 | Series 26 | Series 63

Professional Designations: Chartered Financial Consultant | Chartered Life Underwriter

EXPERIENCE:

PRUDENTIAL RETIREMENT, 200 WOOD AVENUE, WOODBRIDGE, NJ

Senior Communications Specialist, Strategic Relationships Experience
August, 2013 to Present

- Develop and implement strategic communications plans in a variety of traditional and digital media, including all writing (e.g., web, video, multimedia, etc.), to drive awareness of, and participation in, key initiatives that help drive the business (e.g., new CRM, Leadership Competencies Program, Investment Story, etc.).
- Meeting design for advisors, clients (plan sponsors) and internal associates, including executive speech writing.
- Market-facing script writing and communications.
- Planning and execution of monthly "Hot Topics" calls, a venue for revenue-generating sales ideas and news, for market-facing associates.
- Launched and maintain a monthly multi-media recognition program.
- Managed and trained one direct report; key role in the hiring of additional associates.

METROPOLITAN LIFE INSURANCE COMPANY, 200 PARK AVENUE, NEW YORK, NY

Positions Held:
Senior Marketing Consultant, Workplace Initiatives
January, 2011 to July, 2013

- Developed strategic marketing plans, employee communication programs, integrated campaigns and robust collateral in several, complementing media targeting plan participants to drive enrollment and ancillary sales in the non-profit qualified retirement savings plan market. Suite included educational content related to tax law, investing and retirement planning, along with materials that promote specific MetLife products (e.g., annuities and mutual funds) and cross-sell opportunities.
- Developed plan sponsor-facing marketing collateral promoting Workplace Initiatives offerings, including PlanSmart® (retirewise®, Executive Services, Deliver the Promise), MetLife Resources, Pension Resource Center and Business Advantage.
- Wrote content appropriate for several media, including enrollment materials, seminars, websites, articles, multi-media presentations, brochures, slip sheets, etc.
- Provided consultative services to Account Mangers in order to deliver customized campaigns and collateral specific to a plan sponsor's needs and culture.
- Awarded the Company's highest performance rating.

Marketing & Communications Manager, Practice Development Group
November 2008 to December, 2010

- Expanded role resulting from the merging of the Financial Solutions Group and the Field Development Group; encompassed developing and executing marketing and communications for financial advisor recruits, top producer programs and firm and advisor development, in addition to responsibilities as Marketing Manager for the former Financial Solutions Group.
- Partnered with senior executives to proactively build strategically aligned, robust and multi-media communications plans and campaigns to promote key initiatives. Plans were designed to increase awareness and engagement of strategic business drivers and tied to the Company's priorities and platforms.
- Delivered consumer-facing marketing collateral promoting financial planning and advanced markets financial strategies around retirement, tax, estate, business, executive and investment planning.
- Re-branded and repositioned special needs planning on internal and national levels, including national (e.g., *Exceptional Parent*) and local ads, brochures, slip sheets, etc.
- Re-branded experienced and inexperienced advisor recruiting marketing collateral suite**,** including national ads, brochures, etc. Inexperienced collateral targeted to career changers, women and recent college grads; women's recruiting included a brochure, slip sheet, full-page *Working Mother* ad and microsite.
- Recruited one marketing/communications professional and one communications/Web technology professional.
- Awarded the Company's highest performance rating two consecutive years.

Marketing & Communications Manager, Financial Solutions Group

April, 2005 to November, 2008

- Developed and implemented robust consumer, internal and industry-targeted marketing plans to meet the business objectives of the Financial Solutions Group (FSG) and the Company. Included FSG as a whole, Advanced Markets (business owner and affluent markets), Enterprise Financial Planning (fee-based planning), MetDESK® (MetLife's Division of Estate Planning for Special Kids) and the Enterprise GLBT Program (Gay, Lesbian, Bisexual, Transgender).
- Executed marketing strategies by maintaining and growing partnerships with senior management, business owners, product areas, Financial Services Representatives, Pubic Relations, Corporate Advertising, Compliance, Creative Services, Individual Business and Institutional Marketing, and outside consultants and vendors.
- Implemented strategies and campaigns by developing collateral in several media, including brochures, slip sheets, mailers, articles (national and bylined), ads (national and local), seminars, presentations, interactive CD ROMs, Web content, newsletters, etc.
- Ensured messaging and value story were consistent across all lines and supported key business initiatives, positioning MetLife as a financial services thought leader.
- Measured effectiveness of marketing strategies via usage and response.
    - In 2008, over 100,000 consumer brochures were sold to MetLife's 1,800 Financial Planners
- Developed and delivered workshops and presentations on marketing collateral and target markets.
- Led the Enterprise GLBT Program, including the delivery of marketing collateral and training.
    - Company awarded a perfect Human Rights Campaign score five consecutive years
- Revamped entire consumer, Institutional and internal MetDESK marketing suite.
- Issues-based consumer collateral focused on retirement, investment, tax, college, estate, business owner and general financial planning.
- Recruited and managed one marketing consultant.
- All projects delivered on time with positive results.
- Awarded the Company's highest performance rating two consecutive years.

Marketing Manager, Group Disability
March, 2004 – March, 2005

- Managed and developed strategic Thought Leadership marketing programs and campaigns to position MetLife as the group disability leader.
- Partnered with leading advertising agency to deliver an award-winning integrated marketing campaign utilizing online banners, eAdvertorials, print ads, Web site and rich content. Achieved impressive ROI:
    - Thought Leadership marketing program produced a 10.15% increase in quote requests.
    - 25% click-through rate in eMail promotions (average was 5%).
    - Web site experienced a 25% conversion rate of users to eLeads, far exceeding original goal
- Other responsibilities included strategic positioning, promoting awareness, leading the Enterprise GLBT Program, MetDESK liaison, Field communications and the creation of employer and intermediary sales collateral.

Marketing & Communications Manager, Enterprise Financial Planning
November, 2001 to March, 2004

- Managed a team to market MetLife Securities, Inc. and New England Securities Corporation financial planning services and Financial Planners to consumers and within the organization.
- Marketing programs developed and executed for use by producers with consumers; included a myriad of ad and direct mail campaigns, individual planner Web site programs, brochures, seminars, bylined articles, etc. Topics covered ranged from general financial planning to the tactical, including estate planning, retirement planning, college planning, investment planning, etc.
- Slashed previous marketing expenses by 750% during the first year, while delivering more tools in several media. Savings realized through proper vendor management and networking with efficient use of company resources.
- Quality and impact gauged on record-high usage of materials.
- Managed and developed producer communications that included success stories, sales ideas and best practices.
- Launched and led the Enterprise GLBT Program, a marketing program for Financial Services Representatives who target the gay, lesbian, bisexual and transgender market.
- Awarded the Company's highest performance rating.

Senior Financial Writer and Project Manager, Financial Services Marketing
January, 1997 to October, 2001

- Delivered MetLife's entire public seminar program for use by Individual Business Financial Services Representatives. Covered a myriad of issues-based topics, including retirement, investing, college, long-term care, tax, business owner and estate planning.
- Launched and managed an internal bi-weekly magazine (Selling Made Easy), a publication designed to inform the Financial Services Representatives about new products, product enhancements, sales ideas and success stories. Also wrote columns dedicated to industry and government news at it pertained to the Company's business.
- Developed marketing material, including brochures and slip sheets.
- Awarded the Company's highest performance rating.

<u>EDUCATION:</u>

The American College
Chartered Financial Consultant
Chartered Life Underwriter

Montclair State University
Bachelor of Arts, English
Alpha Phi Omega; President, Vice-President and Public Relations

Berkeley College
Associate of Applied Science, Marketing & Management; Graduated with Honors

<u>AUTHOR</u>:
Son of a Dog," 2008; "Cruise to Nowhere," 2009; "The Neighbor Wars of Bradbury Court," Coming 2015