Jonathan Anderson

Jonathan Anderson is Vice President of Institutional Sales for BrightScope. He is responsible for helping asset managers, recordkeepers, and broker-dealers make better, data driven decisions by utilizing BrightScopes industry leading market intelligence and data stewardship software.

Prior to joining BrightScope in 2012, Jonathan was the West Region Manager for LPL Financial Retirement Partners where he worked very closely with some of the most influential financial advisors in the retirement plan industry. He currently holds his Accredited Investment Fiduciary (AIF®) designation and is a C(k)P® candidate.

Jonathan officially entered the financial services world as a producing financial advisor with AIG Retirement later joining LPL Financial.

His philanthropic activity includes founding the Jeffrey J. Anderson Business Leaders Scholarship at Franciscan University of Steubenville, his alma mater, where he graduated Cum Laude with a BA in Economics.

Jonathan lives in San Diego, CA with his beautiful wife and two little boys with whom he enjoys the outdoors at every opportunity.

JONATHAN D. ANDERSON AIF©

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PROFILE SUMMARY

Experienced Defined Contribution Sales and Service Professional with a consistent track record of top ranked performance.

- ✓ Top performing defined contribution professional skilled in leading highly specialized financial intermediaries in the retirement plan space with industry best practices, tools, resources, and strategies to achieve dramatic growth.
- ✓ Deep knowledge in the use data intelligence to identify growth opportunities, track business, segment clients and incentivize sales across leading financial services organizations.
- ✓ Career includes high-profile positions with AIG, Colorado Financial Partners, LPL Financial and BrightScope. Noted for ALWAYS exceeding 100% of goals.
- ✓ Excel in a team setting to apply key initiatives that are aligned with corporate goals to drive revenue growth.
- ✓ Interact well with people at all levels. Equally strong in leading projects from development to implementation.
- ✓ Well-versed in contract administration, documentation management, and industry rules and regulations.

PROFESSIONAL EXPERIENCE

BrightScope - San Diego, CA **09/2012 - Present**
Vice President - Institutional Sales
Recruited to develop multilevel partnerships with the nation's leading financial services firms, including broker-dealers, asset managers, and recordkeepers in order to promote the complex purchase of enterprise data stewardship software. Demonstrate relationship building, fact finding and persuasion abilities to expand industry leading offering.

- **Produced over $1.8M in new revenue** within first 12 months.
- **Delivered 220%** of first year goal within first 10 months.
- Established **partnership with the #1 global asset manager** (measured by assets).
- Recognized for executing expansion into new product line serving the broker-dealer channel which will **shape the future of data sharing between financial services firms.**
- Established first **segmentation model to promote more efficient national distribution.**

LPL FINANCIAL - San Diego, CA **10/2009 - 09/2012**
West Region Manager - Retirement Partners Division
Hired to build relationships with various defined contribution product providers to support financial advisors and help them grow their business through sharing of best practices, tools and resources to increase plan win-rates plans. Work with over 300 advisors. Analyze existing practices, identify areas for improvement and demonstrate ways to grow book through repeatable and scalable processes. Demonstrate knowledge and understanding of ERISA rules and regulations and changing Fiduciary requirements.

- **Ranked #1 for Performance.**
- **Delivered 133% of Q1 goal in 2012, the highest** of all groups representing 47% of total sales.
- **Produced 225%** of goal in Q2 2012.
- **Achieved 127% of first year's goal** (2010) reaching $2.8B in sales.
- Selected as part of transition team in 2011 overseeing integration and training of acquired firm.
- **Instrumental in reducing approval process 85%** from +8 weeks to 1 week through efficiency analysis of Retirement Plan fiduciary Consulting Program.
- **Recognized for creating new program** to help individual wealth management advisors solicit business from other related professionals (Lawyers, Registered Investment Advisors, CPA, etc) and share revenue.

COLORADO FINANCIAL PARTNERS, AN LPL FINANCIAL FIRM - Greenwood Village, CO **12/2008 - 10/2009**
Wealth Manager
Consulted with high net worth individuals and provided financial and investment advice to meet individual needs and situations. Led team in development of plans and strategies for marketing, acquisition, and client management.

Demonstrated knowledge and understanding of estate planning, insurance, cash management, debt management, asset management, education planning, and tax planning.

- Recognized for exceeding prior years' sales goals while faced with a declining market and **increased sales by 21%** from same time last year.
- **Formed a team of subject matter experts** that included a CPA, CFP, 2 insurance experts, an estate planner, and an asset manager to meet the needs of high net worth clients.
- Developed and applied processes and procedures for each team member to follow from client discovery meeting to implementation meeting complete with charts and timelines for all client deliverables.

AIG RETIREMENT - Lakewood, CO **10/2006 – 12/2008**
Financial Advisor
Serviced and maintained 600+ client accounts and established new business relationships during acquisition period. Consulted with others on products and services that included financial planning, insurance, investments, retirement plans, 403B/401K and IRA management, group administration services, and personal financial advising. Generated leads and established network of potential clients with a solid referral process from existing client base. Trained and mentored newly hired financial advisors and shared techniques for success.

- Created a "Teacher Reward" T-Shirt Program for group of teachers that lead to sales conversations and a public speaking event for 100+ teachers of which **6% new clients** were attained from this result alone.
- Conducted an informative and persuasive presentation and **secured contract with a very large school district** as the sold third party remitter and servicer for the entire districts retirement plan.
- Devised and introduced a 1-page advertising piece that incorporated service offerings and schedule of events through the "all-employee" mail channel that increased personal client acquisition from this prospect group from **2 to 5 clients monthly, an increase of 250%.**
- Implemented a client tracking system that incorporated time of initial prospect meeting to asset discovery and more. This process monitored direct revenue business activity and kept the focus on business plan goals with client satisfaction assured and a **250% increase in new client acquisitions.**
- Developed implementation strategy for territory management, and increased exposure efficiency, sales, and acquisition numbers. **Grew client acquisition from 12 to 50** within the first year. Shared strategies at multiple district speaking engagements and received Platinum Service Award for client service.
- **Selected by corporate** to train, mentor, and motivate other advisors in these specialized processes and procedures that **vaulted others to same level of success.**
- Recognized as **#1 rookie in sales** for assets brought in and clients added from entire US Southwest region.
- Achieved annual sales goals within first year in position and doubled by year end with final number at **206% to goal.** Maintained goal in second year despite faced with negative press and parent company losses of $99B.

JEFFERSON COUNTY CHAMBER OF COMMERCE - Steubenville, OH **9/2005 – 8/2006**
Assistant to President
Provided business and administrative support to President and planned, coordinated, and facilitated multiple projects and networking opportunities for Chamber members. Communicated frequently with Chamber members throughout the county and supported sustained business growth and development.

- **Created a local television commercial** that aired on all local channels.
- Facilitated successful project management for a fundraiser known as "Quest for Care 5K" for a struggling local health clinic that included a 5K race with 100 participants, over 15 volunteers, and raised $3,000 for the clinic.

EDUCATION, LICENSURE, AND COMPUTER SPECIFICS

Bachelor of Arts in Economics • Cum Laude• Franciscan University of Steubenville, Steubenville, OH, 2006

Designations:
Accredited Investment Fiduciary (AIF)©, and a C(k)P Candidate at The Retirement Advisor University at UCLA Anderson School of Management Executive Education.

Computer Specifics:
Salesforce.com, MS Word, MS PowerPoint, MS Excel, MS Access, Morningstar, Outlook, Principia Pro, Siebel CRM, Moneytree, Joomla, FiRM, Pathfinder, Brightscope, all social media outlets, Windows and Google Chrome.