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**BRANDING CONSULTANT/AWARD-WINNING WRITER**

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*Successfully Building Service Businesses through Brand Marketing + Communications*

**RECOGNIZED EXPERT IN FINANCIAL AND HEALTH SERVICES**

Identifies **profitable business opportunities** and **creates compelling positioning** to capitalize on them.

**Proven success creating stand-out branding** in highly-competitive industries with **stringent regulations**.

**Advanced knowledge** of the economy, financial markets and investment services. Former Series 24 + 7 licenses.

**Award-winning copywriter** and content strategist, delivering **on-point messaging** in all media.

**SELECTED ACCOMPLISHMENTS**

- Invented and made a profit on Annual Consumer Survey for **American Banker** newspaper, creating a platform from which to give speeches and drive subscription growth.
- Built profitable brand differentiation by achieving top-five rankings in surveys from key financial media for a decade through creation of integrated communications plan, Web site strategy and survey response process at **Muriel Siebert & Co., Inc.**
- Innovated a new business model to safeguard bank distribution of the \$4.6 billion Travelers Cheque business in light of **American Express'** growing position as a bank competitor via its Card businesses.

**STRENGTHS AND COMPETENCIES**

- Quick Study with Keen Strategic Vision
- Expert Needs Assessment and Process Origination
- Team Player with Collaborative Approach
- Web Site Positioning, Navigation and Copywriting
- TV Commercials and Video Scripts/Production
- Expertise in Marketing, Branding and PR
- Project Management and Consulting
- Digital Marketing/Social Media
- Product Naming, Brochures, Advertising
- Competitive Monitoring and Analysis

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**PROFESSIONAL EXPERIENCE**

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**STRATEGIC COMMUNICATIONS CONSULTING, FORT LEE, NJ**

Nov. 2013 -

*Strategy, branding, positioning, writing*

**MARKETING AND BRANDING CONSULTANT/WRITER**

Clients include:

**BlueStar SeniorTech**

*Solutions for Seniors to stay at home: safe, healthy, connected*

Named products, created positioning and wrote Web site copy and Facebook ads.

**Online Stock Brokerage (Confidential)**

*Start-Up Seeking Appropriate Niche and Positioning*

Branding and copywriting for start-up and its Web site.

**MassageAtWorkUSA.com, Ft. Lee, NJ**

*Premier Corporate Chair Massage Provider*

Business and marketing consulting; branding, positioning, Web site navigation and copywriting.

**FreshBrick Brand Builders Mineola, NY**

*Boutique Full-Service Advertising Agency*

Positioning and copywriting for Empire National Bank Web site, focusing on business targets.

**Econoday, Lafayette, CA**

*Economic Education and Information*

Positioning and copywriting for new Web site and crafting of proposal to introduce new product.

**Muriel F. Siebert Foundation, New York, NY**

*Non-Profit Promoting Personal Financial Literacy*

Positioning and copywriting for Web site and Personal Finance Program for high school teachers.

**Muriel Siebert & Co., Inc., New York, NY**

*Well-respected national discount stock and bond brokerage firm*

Communications and marketing consulting, including writing of monthly client newsletter.

**MURIEL SIEBERT & CO., INC., NEW YORK, NY***National discount stock and bond brokerage firm***SENIOR VICE PRESIDENT, CHIEF MARKETING AND e-BUSINESS OFFICER**

2001 - 2013

Directed, managed and executed marketing and communications, including strategy and positioning.

- Supervised staff/vendors and/or wrote/edited all of the company's marketing and communications materials, including press releases; annual reports; monthly client newsletter; Web sites; print, television, e-mail and online advertising; brochures, speeches and client communications.
- Achieved top-five rankings from key financial media for a decade through creation of integrated communications plan, Web site strategy and media survey response process.
- Managed relationships with key industry reporters/editors and surveyors; acted as spokesperson.
- Worked with Web design, Operations and Compliance Teams to assess needs and write Web, call center and internal procedures for fulfilling marketing campaigns and posting public information.
- Re-positioned *Women's Financial Network at Siebert* and wrote new site.
- Supervised industry and Web gap analysis and worked with developers to create new trading, research and data features and redesign user interfaces for marketing site and trading platform.

**CHOICETRADE.COM, SOUTH PLAINFIELD, NJ**

2000 - 2001

*Educationally-focused online stock brokerage firm***EXECUTIVE VICE PRESIDENT, CHIEF MARKETING OFFICER**

Created positioning; negotiated strategic, content and advertising alliances; prepared marketing and communications plans and directed design and writing of collateral and Web site. Worked with engineers to create new trading platform and user interface.

**STRATEGIC COMMUNICATIONS CONSULTING, NEW YORK, NY**

1993 - 2000

*Strategy, branding, positioning, writing***MARKETING AND COMMUNICATIONS STRATEGIST /WRITER**

Performed freelance and in-house consulting on a variety of long-term projects, including:

- Wrote and directed production of **JP Morgan** Careers Web site and recruitment marketing materials.
- Same role as above from February 2001-October 2013 for **Muriel Siebert & Co., Inc.**
- Analyzed responses to research, repositioned and rewrote national banking survey results for **KPMG**.
- Wrote research yielding solid positioning for large multi-national bank at **Financial Market Research**.
- Originated positioning and wrote Web site for **MarketConnex** global intermarket trading portal.
- Created branding, wrote and oversaw design of brochures, presentations, newsletters and business cards for **Alternative Center for Natural Healing** and **Clinical Psychologist**.

**AMERICAN EXPRESS TRAVEL RELATED SERVICES CO., New York, NY**

1988 - 1993

*The premier provider of cards, travel and diversified financial services***DIRECTOR, SALES PROMOTION AND PUBLIC RELATIONS**

Managed a department of eight and a \$3.5 million budget with responsibility for Travelers Cheque Group and financial services institution communications, including print advertising, trade and consumer promotions, point-of-sale signage and leaflets, new product support, media/public relations and issues management for Travelers Cheques, Gift Cheques, 1-900-Weather and Cheques for Two. Acted as headquarters resource for international counterparts. Surpassed revenue targets through the institution of cause-related promotions in the American Express Travelers Cheque Group and cut promotion costs by more than \$150,000. Winner of the following awards:

- Creativity in Public Relations Award for PR launch of Cheques for Two.
- Public Relations Society of America Silver Anvil Certificate for PR launch of 1-900-Weather.
- Public Relations Society of New York Big Apple Award for Employee Motivational Video
- Blue Box Employee Communications Award for Baldrige Award plan.
- Graphic Arts Association Design Award for 1-900-Weather poster.

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**AMERICAN EXPRESS TRAVEL RELATED SERVICES CO. (continued)**

1988 - 1993

**DIRECTOR, FINANCIAL SERVICES COMMUNICATIONS**

Innovated a new business in order to safeguard bank distribution of the \$4.6 billion Travelers Cheque business in light of American Express' growing position as a bank competitor via its Card and lending businesses.

**AMERICAN BANKER, New York, NY**

*The leading information resource serving the banking and financial services community*

**ASSOCIATE EDITOR**

1983 - 1988

Wrote and edited news and analysis of global consumer financial services with an emphasis on marketing. Invented, executed and made a profit on the annual Consumer Survey (now Gallup/American Banker Consumer Survey), creating a platform from which to give speeches and drive subscription growth. Regularly spoke before industry groups, on television and radio. Taught at School of Bank Marketing. Managed junior writers. Winner of awards for excellence in financial writing:

- New York Business Press Editors for Financial Writing
- New England Business Press Editors for Feature Writing.
- Pannell Kerr Forster Financial Writing Achievement Award for "creating a better public understanding of a complex financial issue."

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**EDUCATION**

**Teachers College, Columbia University, MA**, Communications/School-Community Coordination; GPA 4.0

**Pacific College of Oriental Medicine, MS**, Acupuncture and Chinese Herbal Medicine; GPA 3.9

**Boston University, BA**, Psychology; GPA 3.3, Cum Laude

- Recipient of Boston University Scarlet Key and Young Alumni Achievement Awards.

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**LICENSES AND CERTIFICATIONS**

Former **FINRA Series 24** General Securities Principal and **FINRA Series 7** Registered Representative.

**L.Ac.** New York State Licensed Acupuncturist.

Former **Diplomate in Acupuncture and Chinese Herbal Medicine**. National Certification Commission for Acupuncture and Oriental Medicine (NCCAOM).

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**PUBLICATIONS**

Member, Editorial Advisory Board; Industry Expert and Author of Chapter 2, "The Impact of Deregulation and Environmental Forces: Customers," in *The Financial Services Handbook*, eds. Eileen M. Friars and Robert N. Gogel (John Wiley & Sons, Inc., ©1987).