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ALI MCCARTHY

PHD | CMO

FINANCIAL SERVICES & TECH EXECUTIVE
MARKETING & COMMUNICATIONS SPECIALIST
EMOTIONAL INTELLIGENCE EXPERT

EXECUTIVE PROFILE

Results-oriented and forward-thinking marketing and behavioral science professional with +22 years of distinguished performance in the financial services and fintech industry. Consistent track record of leading marketing teams to generate growth in both entrepreneurial environments and within larger corporations. Recognized as having a unique vantage point of being able to blend an academic, evidenced-based mindset management approach with seamless integration of behavioral sciences into the client-advisor relationship. Exceeds at daily demands of driving brand reputation and business growth and defining a long-term vision for modernizing marketing and communications.

EXPERTISE

MARKETING & PRACTICE MANAGEMENT

Branding, Demand Generation, & Account Based Marketing
Data Strategy, Analytics, & Artificial Intelligence
Marketing Tech Stack Integration into Salesforce CRM
Corporate Sponsorships & Advertising
Media Relations & Crisis Communications
Growth & Business Transformation Frameworks
Product & Thought Leadership Content
Event Strategy & Practice Management Program Development

BEHAVIORAL SCIENCE

Market & Customer Research
Emotional Intelligence Coach & Corporate Mentor
Podcast Host, Subject Matter Expert, & Keynote Speaker

WORK EXPERIENCE

CHIEF MARKETING OFFICER
Skience | Herndon, VA (remote) | Jun 2021 - Mar 2023

Skience is an award-winning SaaS-based platform and consultancy that empowers wealth management firms to achieve back-office digital enablement.

- Developed the yearly and quarterly marketing plans that resulted in marketing qualified opportunities of $14 million and sales qualified pipeline of $5 million (2022).
- Worked with sales team to launch demand and lead generation account-based marketing campaigns that resulted in $13 million in SaaS Annual Recurring Revenue (2022).
- Managed high-performing team of 15 in-house staff, external consultants, and agency partners.
- Assessed and implemented comprehensive marketing technology stack that fully integrated into Salesforce CRM and increased team efficiency by 70%.
- Introduced and co-hosted CRM Unlocked podcast that resulted in expansion of market share and increased overall web-traffic 59%.
- Led buyer persona research resulting in 8 distinct buyer and influencer types. Used this data to craft specific messages and segment ABM campaigns for more direct and relevant content.

SVP, HEAD OF PRACTICE MANAGEMENT
Orion Advisor Solutions | Berwyn, PA | Dec 2020 - Jun 2021

Post the Brinker Capital merger with Orion, lead the development of the firm's first proprietary practice management program.

- Designed innovative ideas and drove the development of a new business unit that aligned with business priorities to help meet corporate KPIs and lead generation targets.
- In under 1 year, spearheaded the technology platform, thought leadership content, and distribution strategy to help financial professionals who work with Orion grow their business and attain success.

CHIEF MARKETING OFFICER
Brinker Capital | Berwyn, PA | Aug 2012 - Dec 2020

Brinker Capital is an investment management company that delivers an institutional multi-asset class investment experience to investors.

- Lead a high-performing 10-person department that increased asset growth of products and services to 5,500+ advisors within independent and insurance-based broker-dealers and RIA's.
- Created comprehensive marketing campaigns that helped the firm achieve exceptional organic growth and 7 years of revenue growth.
- Developed multi-channel promotions to support $12B Destinations Mutual Fund complex, $5B high-net-worth offering, and 150+ high conviction SMA products.
- Collaborated with sales and portfolio management team to develop client engagement programs that achieved 90% client retention rate.
- During COVID-19 pandemic, successfully executed hundreds of virtual events. Managed in-person and virtual financial professional business-building events with audiences from 20 to 600 attendees.
- Built and delivered The Center for Outcomes and the Behavioral Innovation Lab which provided the tools, training, and technology to help financial professionals apply behavioral science.

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EDUCATION

Ph.D. in Advanced Studies in Human Behavior | Capella University, 2020. Dissertation title: *Exploring the Relationship between Financial Advisor Emotional Intelligence and Perceived Client Relationship Markers* (Available through ProQuest Dissertations & Theses Global, Order No. 28029307)

Master of Business Administration | Texas A&M University, Commerce, 2011

Bachelor's in Marketing & Minor in Public Relations | Purdue University, Calumet, 1999

International Public Relations Study Abroad Program | Oxford University, England, 1999

PROFESSIONAL DEVELOPMENT

EQi 2.0 and EQi-360 Emotional Intelligence Certification | Multi-Health Systems

Series 6, 26, and 63 FINRA Licensed (expire Summer 2023)

Presentation Training | The Fusion Group and Mark Magnacca

Salesforce Trailhead Rank | Hiker

AFFILIATIONS

- Fintech Innovation for the Capital Markets, Asset and Wealth Management
- CMO Huddles
- Females & Finance
- The National Society of Leadership & Success

References available upon request.

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WORK EXPERIENCE (CONT'D)

DIRECTOR
Guardian Life Ins. Co. | New York, NY | 2009 - 2012

As part of the third-party distribution team, directed strategic and organizational leadership to a newly formed Channel Marketing team.

- Conducted small business owner research which led to the creation of a new revenue channel for sales and marketing to pursue. Analyzed research data and created go-to-market materials for sales team to use with financial professionals.
- Executed print, digital, and interactive campaigns that grew brand awareness by 35%, which exceeded internal expectations.
- Negotiated new contracts with existing vendors, resulting in an annual savings of $1M YoY within the marketing department.

VICE PRESIDENT
AB (formerly AllianceBernstein) | New York, NY | 2007 - 2009

As part of the sub-advisory team, supported 11 national sales team members and 12 relationship managers within retail and institutional channel.

- Developed and implemented strategic marketing plans that lead to the sub-advisory team achieving its sales goal within the top 20 insurance companies.
- Created and maintained collateral, blogs, press releases, RFPs/DDQs, research reports, and email campaigns that positioned the company as a leader in the sub-advisory space, increasing brand awareness by 10%.
- Organized networking events with 200+ participants across top insurance companies.

ASSISTANT VICE PRESIDENT
Equitable (formerly AXA Equitable) | New York, NY | 2005 - 2007

As part of the third-party distribution team, marketed annuities through +600 banks, independent broker-dealers, and wirehouses.

- Provided creative direction, project management, budget maintenance, and communication oversight to ensure sales team achieved annuity sales goal.
- Cultivated relationships and coordinated with vendors and internal operations to ensure accurate and on-time marketing materials delivery.
- Facilitated systematic training program for over 100 sales reps on new product and marketing program roll-outs.
- Developed tracking mechanism to identify costs and daily production volume to ensure marketing projects were completed on time and within budget.
- Won Excellence Award for outstanding performance and contributions to the firm.

PREVIOUS EXPERIENCE

ASSISTANT VICE PRESIDENT
Scudder/Deutsche Bank | Chicago, IL & NYC | 2001 - 2005

PUBLIC RELATIONS ACCOUNT EXECUTIVE
Ruder Finn | Chicago, IL | 1999 - 2001

MEDICAL INFORMATION COORDINATOR
St. Margaret Mercy Home Health Care | Lansing, IL | 1995 - 1999