

### PROFESSIONAL SUMMARY

Senior Copywriter and Content Strategist with extensive experience in financial services marketing. Proven expertise in multi-channel campaigns, narrative storytelling, and thought leadership. Adept at collaborating with cross-functional teams to create impactful digital, social, and print content that drives advisor recruitment and client engagement. Skilled in SEO, AI-driven content, and data-informed strategies to deliver business results.

### KEY QUALIFICATIONS & SKILLS

- Expertise in creating thought leadership materials, peer-to-peer success stories, and value propositions for B2B audiences.
- Proficient in producing multi-channel content, including white papers, case studies, landing pages, emails, and video scripts.
- Strong ability to manage multiple, often complex projects and deadlines concurrently while maintaining quality and consistency.
- Experienced in branding, content strategy, lifecycle marketing, and SEO.
- Tools: SEMrush, Google Suite, Microsoft Office, Figma, Canva, seo.ai, jasper.ai, ChatGPT.

### CONTENT STRATEGY & CREATION

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**Lead Content Designer/Content Strategist (contract) · Wells Fargo Corporate & Investment Banking · San Francisco, CA. Feb. 2024 – Nov. 2024**

- Collaborated with internal stakeholders, including senior leadership and product teams, to deliver compelling marketing content that supported advisor recruitment and retention goals.
- Developed peer-to-peer success stories, white papers, and thought leadership articles showcasing the value of Wells Fargo's financial solutions.
- Conducted competitive analyses and research to refine messaging and differentiate Wells Fargo in the financial services industry.
- Led content creation for Capital Markets, M&A, Sustainable Finance, and other lines of business, ensuring alignment with brand voice and audience needs.

**Marketing Copywriter · Ubiquity Retirement + Savings · San Francisco, CA. Jan. 2022 – Sept. 2023**

- Authored engaging content to communicate Ubiquity's value proposition, driving trust and engagement among financial advisors and investors.
- Collaborated with compliance, PR, and design teams to produce high-quality marketing materials, including email campaigns, social media posts, and blog content.
- Created thought leadership content that elevated brand authority and resonated with target audiences.

**Content Specialist/Copywriter · EQIS Capital Management · San Rafael, CA. Oct. 2019 – Dec. 2021**

- Created personalized marketing collateral, including white papers, sales brochures, email campaigns, and social media content, to support financial advisors in their client interactions.
- Worked closely with subject matter experts to translate complex financial concepts into accessible, engaging materials for both B2B and B2C audiences.
- Launched a blog and monthly newsletter that increased website traffic, generated leads, and strengthened advisor relationships.

**Freelance Content Creator/Strategist · San Rafael, CA. 2007 – Oct. 2019**

- Developed SEO-optimized website content and marketing materials for financial services clients, including Union Bank and Robert Half.
- Created value propositions, success stories, and thought leadership pieces tailored to consumers, B2B, and institutional audiences.
- Partnered with clients to deliver content strategies and original content that supported brand differentiation and marketing efforts.

**Assistant Editor · Mystery Scene Magazine · New York, NY. 2003 – 2005**

- Edited, proofread, and fact-checked all columns, feature articles, and book reviews for the magazine.
- Wrote book reviews and contributed to high-quality monthly publications.

## CONSUMER MARKETING

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**Circulation Manager · Newsweek Magazine · New York, NY. 2001 – 2003**

- Directed all day-to-day operations of direct mail and insert card planning, execution, tracking, and analysis.
- Collaborated with creative teams to develop winning circulation marketing materials.

**Associate Marketing Manager · Time Magazine · New York, NY. 1999 – 2001**

- Managed monthly and quarterly direct mail campaigns in senior, multicultural, and college markets.
- Successfully fostered multiple vendor relationships to develop effective marketing collateral.

## EDUCATION

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MFA, Creative Writing · New School University  
BA, Art History · Douglass College of Rutgers University