

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

Marketing Content Strategy Consultant · San Rafael, CA. Oct. 2023 - Present

- **Senior Copywriter (contract) · Cetera Financial Services · San Francisco, CA. Feb. 2025 – Present**
 - ✓ Collaborate with internal subject-matter experts, teams, and stakeholders across the Cetera organization and channel communities, including senior leadership, as well as external contractors and vendors to create, update, or improve marketing-focused copy promoting Cetera's products, services and channel communities.
 - ✓ Research target audience segments to understand their needs, challenges, and preferences and clearly map out a winning value proposition.
 - ✓ Create marketing collateral to drive lead generation, including emails; web banners; social media posts and ads; landing pages; info pages, articles and whitepapers.
- **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, whitepapers, and thought leadership articles showcasing the value of Wells Fargo's financial solutions.
 - ✓ Led content creation for Capital Markets, M&A, Sustainable Finance, and other lines of business, ensuring alignment with brand voice and audience needs.

Senior Content Strategist · 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

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

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