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| **JOAN HULL, CFA** |  |
| **DIRECTOR / VP - CUSTOMER / INVESTOR RELATIONS** |  |
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**Global Accounts | Business Development | Client Portfolio Management MarCom | Marketing & Growth Strategies | Market Expansion**

**New Market Penetration | Company & Product Positioning**

**Profit Improvement | Analytics & Reporting | Data-driven Decisions**

**C-Level Decision Support**

15+ years of global success in leading sales, client relations, marketing and communications functions within the institutional asset management market. Record of cultivating strong client relationships, developing and driving marketing strategies, and delivering significant results. Have earned accolades as an energetic and intuitive relationship builder. Excel at…

* **Spearheading the creation and execution of innovative sales, marketing and communication strategies**
* **Generating client growth within niche markets by executing strategic target marketing**
* **Opening new domestic and international markets**
* **Identifying niche opportunities, guiding new product development to meet demand**
* **Improving client retention and expanding account growth**

Education: BA, Biology and Psychology with a concentration in Neuroscience, Franklin and Marshall College, 1999. CFA Charterholder. Series 7, 63, 66. Noted for striving for the next improvement, pulling the most out of people.

**Work History**

**Director of Global Institutional Sales and Director of Communications**

International Value Advisers (IVA)

May 2010 – Feb 2019

Recruited to join IVA by colleagues and former leaders at First Eagle to build out the institutional client base. Cultivated global institutional client and consultant relationships totaling over $5 billion in client assets invested through separately managed accounts, mutual funds, limited partnerships and a Luxembourg-registered SICAV. Selected to lead marketing and communications efforts upon departure of the prior incumbent.

* **Opened a new market.** IVA hadrecently launched a Luxembourg domiciled UCITS (the IVA Global SICAV). Selected to spearhead the effort to build out its assets in the European market, focusing on Switzerland. Constructed a business development strategy and developed customized marketing materials for the product. SICAV assets grew to over $1.5 billion.
* **Transformed marketing role into a superior sales and client service resource.**  Boosted effectiveness of client-facing teams by establishing a hub of internal information to help better attract and retain clients on the institutional and retail sides of the business. This hub included standardized talking points on the portfolio and investment team’s global economic outlook and analytics on portfolio performance and holdings.
* **Upgraded and revamped all external marketing materials.** Created a strategy to differentiate the company in response to the market’s shift from active to passive and to provide clients transparency and information around IVA’s portfolios. Oversaw creation of new marcom materials. Designed and maintained company website and LinkedIn page to enhance brand engagement and improve audience reach. Clients felt they were better informed, contributing to retention and growth of client assets across the firm. Peak firm assets were over $20 billion.
* **Reopened all investment vehicles to new investors (mutual funds, SICAV, LPs, SMAs)**. Spearheaded innovative sales, marketing and communication strategies to drive the successful re-opening of all investment products to new investors in 2018. Shortly after the firm was open to new SMAs, closed a $100 million account.

**AVP, Institutional Sales, Marketing and Product Development**

First Eagle Investment Management

May 2008 - May 2010

Recruited by newly appointed Director of Institutional Sales to build out the group, secure existing client relationships, and grow client assets after a large turnover event in the investment team.

* **Generated new institutional investments.** Focused on the yet unexplored small- mid-sized institutional consultant market. Defined target end-client (HNW, Family Offices, Endowments and Foundations) and then identified consultants serving this end client. Developed and executed sales strategy that enabled First Eagle to penetrate this consultant market. Efforts directly led to over $10 million in closed business over the first year.
* **Re-established relationships with existing investors, focusing efforts on superior client service.** Became proficient in the portfolio analytics system, Factset, and extended training to the rest of my team to give us more autonomy over the analytical portion of client reporting. Revamped and automated client reports for quicker turnaround. Received excellent feedback from clients.
* **Collaborated to reposition the institutional sales team as Subject Matter Experts.** Worked with the investment team to produce detailed and insightful reports on investments for the sales team. Used Factset to build customized performance attribution for client and prospect discussions. These efforts contributed to the successful rebuild and growth of institutional client assets.

**AVP, Institutional Asset Management**

Brown Brothers Harriman

May 2004 to May 2008

Recruited by the newly appointed Head of Insurance Asset Management Sales to grow brand awareness and increase sales.

* **Strengthened presence at industry conferences**. At events focusing on the Captive Insurance Market, designed and oversaw construction of a new conference booth. Devised an overall conference strategy (attendees from our Group, collateral materials, client and prospect events hosted by us at conferences, possible speaking opportunities). Resulted in a significant improvement in industry visibility, which led to easier access to prospects in this market. Captive insurance company investments rose by almost $500 million over 4 years.
* **Generated client growth through prospecting and directed marketing.** SupportedDirector of Sales as we brought in a new client CRM (ACT) to better manage existing client information and keep track of prospecting activity. Brought in a new competitive analysis tool (Evestment Analytics) to produce reports on other managers in our peer group targeting the same client base. Researched prospects through various web-based tools and conducted email and calling campaigns to set up prospect meetings for my manager and eventually for myself. Insurance client assets increased by almost $1.5 billion over 4 years.
* **Managed RFP process for the Team.** In collaboration with the marketing and communications team, constructed new standard RFP responses. Acted as point person for the Team when new RFPs arrived. Coordinated responses, managing process cross-functionally with Marketing and Communications teams.

**Earlier:** Marketing Associate, The Bear Stearns Companies, Inc., May 2003 to May 2004; Marketing / Corporate Communications Associate, Zurich Capital Markets**,** May 2001 to May 2003.

**Keywords**

Branding | PR | Trade Show Presence | Event Strategies | Sales Engagement Planning International | New Account Acquisitions | Customer Acquisition | Regulation Compliance Hiring Recruiting | Global Sales | Modeling | Devising Market Strategies

Increasing Brand Awareness | Creating Marketing Programs | Selecting Marketing Systems

Developing & Monitoring KPIs | Global Marketing