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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**

Joan Hull has led sales, client relations, marketing and communications functions within the institutional asset management market. Her ability to initiate and nurture strong client relationships, in addition to her accomplishments in developing and driving marketing strategies, have earned her numerous promotions and selections to lead critical projects and programs.

The results are what counts, and she has an unblemished record of maximizing sales, profits, market share and stakeholder value in turbulent markets and economies, here and abroad.

Others have described her as an energetic and intuitive relationship builder who is adept at identifying market and niche business and investment development opportunities ahead of the trend. Her exceptionally analytical mind has enabled her to quantitatively target and capture the interest and investments needed to grow a company.

She excels at spearheading the creation and execution of innovative sales, marketing and communication strategies. She has opened new domestic and international markets. Once she has landed a client her ability to manage C-level clients has enabled her to retain and expand relationships.

Her BA is in Biology and Psychology with a concentration in Neuroscience is from Franklin and Marshall College. She is a CFA Charterholder and hold Series 7, 63 and 66 licenses.

**Work History**

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

International Value Advisers (IVA)

May 2010 – Feb 2019

Joan was recruited to IVA by the Founding Partners (all former investment leaders at First Eagle) to build out their institutional client base. Shortly after she started, IVA’s marketing head left and Joan was selected to lead their marketing and communications efforts in addition to her Institutional Team responsibilities.

Joan logged many accomplishments at IVA. She 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.

When she started at IVA, she played a lead role in making the newly-launched Luxembourg domiciled UCITS (the IVA Global SICAV) a success. She constructed a business development strategy that focused on private banks in Switzerland and developed customized marketing materials for the product. As a result, SICAV assets rose to over $1.5 billion.

When Joan was appointed to take over the leadership of marketing and communications for IVA, she transformed the role into a superior sales and client service resource that was much more tightly aligned to the company’s mission than ever before.

Highly successful in this role, she boosted the effectiveness of the 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 portfolios, the investment team’s global economic outlook, and analytics on portfolio performance and holdings. She also upgraded and revamped all external print marketing materials and re-designed and maintained the company website and LinkedIn page to enhance brand engagement and improve audience reach. In short, Joan upgraded the marketing group to both a formal and informal hub of information to better attract and serve IVA’s client base.

When the firm decided to reopen all investment products to new investors in 2018, she spearheaded the creation and execution of innovative sales, marketing and communication strategies for the firm. Shortly after the firm was open to new institutional separately managed accounts, she closed a $100 million new account that has potential for future growth.

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

First Eagle Investment Management

May 2008 - May 2010

For this position, Joan was recruited by the 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 (most of the investment team had recently left to launch a new investment firm, International Value Advisers).

A top priority when Joan joined First Eagle was to re-establish relationships with existing investors, focusing efforts on superior client service in order to allay concerns related to the turnover. As part of this effort, she became proficient in the portfolio analytics system, Factset, and extended training to the rest of the team to give them more autonomy over the analytical portion of client reporting. She then revamped and automated client reports for quicker turnaround. Feedback from clients was excellent. She also collaborated to reposition the institutional sales team as Subject Matter Specialists by working with the investment team and the performance team to produce detailed, insightful and customized portfolio reports for the sales teams. These efforts contributed to the smooth transition and build out of the institutional sales team.

Joan also worked to grow client assets by targeting the yet unexplored small and mid- sized institutional consultant market. She defined target end-clients (HNW, Family Offices, Endowments and Foundations) and then identified consultants serving this end client. Her sales strategy enabled First Eagle to penetrate this market and her efforts directly led to over $10 million in closed business over the first year.

**AVP, Institutional Asset Management**

Brown Brothers Harriman

May 2004 to May 2008

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

Her accomplishments were diverse. She strengthened the company’s presence at industry conferences, focusing on the Captive Insurance Market. She devised and implemented a conference strategy (who should attend, what collateral materials to use, which clients and prospects should be entertained, possible speaking opportunities). At the conferences, she identified prospects and hosted dinners and on-site meetings. An engaging communicator one-on-one and before large groups, she also moderated panels at conferences. Her efforts 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.

Joan is technically savvy. In one example, she selected, customized and implemented a CRM system (ACT) for the sales team and a new competitive analysis system, Evestment Analysis. She served as point person for conversion and management, and conducted training, bridging the gap between users and IT.

She also researched prospects through various web-based tools and conducted email and calling campaigns to set up prospect meetings for her Sales Director and eventually for herself. Insurance client assets increased by almost $1.5 billion over 4 years.

Her earlier career included serving as a Marketing Associate with The Bear Stearns Companies, Inc. (May 2003 to May 2004) and as a Marketing/ Corporate Communications Associate with Zurich Capital Markets (May 2001 to May 2003).

**Work History**

A lover of travel and new adventures, Joan has explored destinations around the globe, with a strong affinity for France and Switzerland. She is a Certified Hatha Vinyasa Yoga Teacher and applies Zen teachings to find strong balance in her fast-paced and exciting life as a successful professional, loving wife and mother.