

STANLEY MORGAN

429 S. Royce Avenue • Los Angeles, CA 90049
310.455.5555 Res • 310.755.6565 Cell • morgans@aol.com

EXECUTIVE – ANNUITIES / MUTUAL FUNDS

Highly accomplished, energetic leader with over 20 years of success driving sales, profits and market share to new heights. A hands-on leader and Player/Coach who excels in opening new markets and building strong sales relationships. Recognized for ability to work collaboratively with clients to identify untapped niches and mutually grow business. Superior public speaking abilities, recognized by clients and industry notables as “one of the best in the business”. Strong understanding and expertise in developing branding, messaging and sales strategies for tapping into the growing retiree market.

Optimistic leader with an entrepreneurial can-do attitude, but with firmly planted pragmatism. Well-rounded management style that creates common vision and forges positive relationships. Proven ability to recruit, motivate and develop a superior staff. Demonstrate the highest level of integrity. Maintain strong relationships with portfolio and asset managers at major financial institutions.

PROFESSIONAL EXPERIENCE

SENIOR VICE PRESIDENT – NATIONAL SALES MANAGER **1996 – SEP 2005**
TRAVELERS LIFE & ANNUITY / METLIFE ♦ LOS ANGELES, CALIFORNIA

Joined firm in new subsidiary, charged to expand wholesaling team focused on wirehouse systems, specifically Morgan Stanley and Fidelity. Challenged to overcome customer’s perceived threat of competition from parent company’s divisions (i.e. Smith Barney). Subsequently promoted to National Sales Manager.

Notable Accomplishments:

- ***Grew sales from \$0 to \$300M in Morgan Stanley and \$0 to \$500M at Fidelity in less than 18 months.***
- ***Managed 6 Wholesalers and grew sales 46% from 1997 to 1998.***
- ***Delivered 126% of 1998 sales goals.***
- ***Credited for exceeding stretch goals issued by Chairman to grow revenues 43% from \$14M to \$20M in 1 month in 1998.***
- ***Promoted to assume oversight as National Sales Manager of Smith Barney and Citibank channels of distribution.***
 - ***Recognized for growing Smith Barney market share from 10.5% to 22% in 1 year and Citibank market share from 10% to 33% in 2002-2003, a volatile year for the industry.***
 - ***Ranked as #1 product in both channels.***
- ***Maintained high level of visibility in field. Selected by Chairman to serve as National Spokesperson to promote annuities domestically and internationally.*** Recruited and trained 14 new Wholesalers growing team to 22 professionals.
- ***Built client loyalty by presenting at hundreds of client seminars hosted by brokerage firms. Earned reputation as “One of the Best in the Business” as stated by numerous customers, industry leaders and Chairman of Travelers. Asked to lead seminars internationally and motivate internal wholesaling teams.***

**SENIOR VICE PRESIDENT – WESTERN DIVISION
NEW ENGLAND FUNDS ✧ LOS ANGELES, CALIFORNIA****1991 – 1996**

Served as Regional Vice President calling upon major wirehouses and financial planners throughout the territory. Challenged to gain competitive advantage against 15 highly visible, well-entrenched competitors.

Notable Accomplishments:

- ***Took company from virtual obscurity to \$1B in sales in 5 years***, delivering +\$400M in retail sales and +\$600M in institutional sales.
- ***Credited for delivering \$50M sale (the largest in the company's history)*** and beating entrenched competition by highlighting competitive advantage and orchestrating executive meetings that built credibility and trust.
- ***Built strong relationships*** by selling solutions and providing sales assistance in group seminars and through 1-on-1 meetings with key clients.

**SENIOR VICE PRESIDENT – WESTERN DIVISION
SMITH BARNEY ✧ LOS ANGELES, CALIFORNIA****1984 – 1991**

Structured/developed marketing strategies for \$400M in private placements for firm's high net worth clients. Reviewed and recommended real estate, aircraft/equipment leasing, cable television investments.

- ***Credited for leading Division from last place to first place in 4 months.***
- ***Noted for expanding client participation by 125% in 1st year.***

EDUCATION

College of Financial Planning ✧ CFP pending 2006**Wharton School of Business and Commerce
Sponsored by SII for 3-year program****British Institute of Marketing****BA, Economics
Ohio Wesleyan University**