JOSHUA JEFFREY

Senior Vice President

PROFILE

Seeking a senior leadership executive role that will utilize consultative sales and client relationship management skills. I aim to find, attract, and develop a strategic and loyal client base for the organization, while managing the long-term sustainable development of the company. With over 22 years of retirement industry experience managing national sales teams, client service and strategic relationship management, I have a proven track record of helping client achieve their long-term financial goals while building brand awareness and loyalty.

CONTACT

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EDUCATION

2000
Tampa Catholic High School

PRO. SKILLS

Strategic and Consultative Sales Planning

Client Development

Strategic Business Planning and Implementation

Change Management

Product Management and Development

Innovative, Entrepreneurial Team Leadership

Emotional Intelligence

Project Management

Financial Services

Time Management

Independent, Organizational Skills

EXPERIENCE

2021-Present
Benetic, Inc.

VICE PRESIDENT OF SALES

- Grew platform utilization from 0 interface users and $0 pipeline to over $10B in less than 24 months
- Onboarded 300+ advisory firms with an average plan size of $25MM in less than 24 months
- Drove business expansion across Aggregator/RIA/Broker Dealer/Recordkeepers/Asset Manager partnerships
- Established vision and strategy for sales expansion through direct collaboration with CEO, product, service executives
- Identified new product offerings to help grow and deepen our relationships with top customers creating new revenue growth opportunities
- Managed and built national sales team with total of 4 direct reports
- Created full suite of sales infrastructure to track, monitor and report results to the executive team and board members
- Created a strategic playbook to qualify potential customers across the organization along with cross selling levers previously not utilized

2019-2020
PCS Retirement/Aspire Financial Services

VICE PRESIDENT | BUSINESS DEVELOPMENT

- Built and managed a group of external and internal sales teams with a total of 16 direct reports
- Executed and was an integral driver of Aspire merger with PCS Retirement through M&A transaction
- Grew revenue goals per region by 25% and successfully exceeded sales goals in 2019 & 2020
- Managed largest strategic partnerships totaling $1.3B in AUM & $2.3MM in annual recurring revenue per year with 25% organic growth year over year

2017-2018
Aspire Financial Services

NATIONAL DIRECTOR BUSINESS DEVELOPMENT, STRATEGIC SALES

- Developed the overall vision and strategy for Aspire's corporate development and partnering initiatives with key strategic channel partners
- Increased sales annualized revenue by 33% over prior year's sales model in 2017
- Grew EBITDA bottom line for sales efficiencies while working with 40% less staff
- Executed and contracted 3 of the largest strategic partnerships which grew to be top 3 revenue drivers across the company

2016-2017

Aspire Financial Services

NATIONAL BUSINESS DEVELOPMENT MANAGER, STRATEGIC SALES

- Established and increased BPO & Institutional Market pipeline from $0.3m in annual recurring revenue to $2.7MM in less than one year
- Increased strategic sales annualized revenue 56% over 2015
- Developed BPO/Block Playbook with SVP of Sales and CMO to have a go-to-market strategy for clients generating $100K+ in annual recurring revenue

2014-2015

Aspire Financial Services

RETIREMENT WHOLESALER, SOUTHEAST

- 2014 & 2015 top sales team (Southeast region); increased 2014 revenue by 53% from prior year and 2015 revenue by 18% from 2014
- Generated increased annual pipeline, on track for another 30% growth from prior year's record-breaking sales for 2015
- Assisted Midwest region from August through December of 2014, generating 75% of 2014 annual recurring revenue for the region in just over 4 months
- Developed and delivered 35% growth nationally with Aspire's two largest revenue partnerships

2002-2013

The Newport Group, Inc.

SR. TEAM LEAD INVESTMENT ANALYST

- Managed plan portfolios and rebalancing for Tier One clients that generated an average of $500K in revenue for the firm
- Managed trading and reporting of Self-Directed Brokerage Accounts with total assets exceeding $4B
- Managed day-to-day relationships for seven trading partners; partnered with Relationship Manager on building customer relationships

2001-2002

PNC Financial - PFPC Retirement Services

NEW BUSINESS SPECIALIST SALES

- Accountable for all aspects of sales, business development and client management
- Effectively prospected clients and pursued leads to generate revenue growth
- Partnered with management in reviewing and updating Plan Rules for approximately 600 plans

ADDITIONAL CERTIFICATIONS & SKILLS

Six Sigma

HubSpot

Daily Valuation

Salesforce

PA1 (Plan Administrator)

PowerBI

Document Agility

Microsoft Dynamics

PA2 (Strategic Financial)

Zoom/Slack/GSuite

ASPPA

Docusign