

PwC, January 2022-April 2023

Director, Trust Solutions Communications (2023) / Director, Investor Engagement (2022)

Hired to build PwC's brand among institutional investors, transitioned to lead of seven-person external and internal communications team for Trust Solutions (TS) business segment, focusing on ESG, audit tech and internal controls, governance and finance sectors.

- Manage team that grew and maintained #1 media coverage share of voice and share of engagement across ESG, Audit and Tax businesses over three quarters, achieved 42% media coverage feature rate and 68% spokesperson quote rate.
- Prepare and train spokespeople, manage interviews, write bylines for multiple Partners among media such as Financial Times, CNBC, Bloomberg, Fortune, New York Times, WSJ/CFO Journal, CFO Dive and Accounting Today.
- Cascade internal comms strategy to strengthen employee engagement. Led team that developed Yammer strategy for audit tech business, resulting in 150% increase in organic and planned posts and 450% increase in staff engagement in FY23.
- Lead quarterly analysis of communications team impact on business strategy, improving reports' timeliness and insights.
- Collaborate with Public Affairs/Issues Management team to develop integrated plans and content that protect PwC around SEC rulemaking, PCAOB reporting, federal legislation and other capital market policymaking.
- Developed, launched strategy for new investor stakeholder program, proactively built relationships with 15+ third parties including CII, CFA Institute, NASDAQ Center for Board Excellence, SIFMA and Milken Institute. Led writing of six surrogate bylines on topics such as value of audit to capital markets.

Association of International Certified Professional Accountants, January 2019-January 2022

Senior Director, Reputation Management

Developed and ran a new, multi-faceted brand management program to build awareness of the B2B and B2C value of the CPA license. Previously managed a three-person team that closely partnered with advocacy and standards leadership to promote the AICPA's federal and state public policy agenda, resulting in average of 5,000+ articles in 2019-2021.

- Promoted the accounting profession's perspective on key issues such as the CARES Act, PPP, IRS deadlines, ESG reporting, audit risks, AI/blockchain/crypto adoption and cyber risk management. 2020-2021 successes included:
 - Drove media campaign for successful launch of SOC for Supply Chain risk framework, arranged 5+ industry analyst briefings to promote suite of services, including SOC for Cybersecurity.
 - Prepared senior executive for Congressional testimony on PPP, developed media strategy to generate engagement with Treasury, SBA, Congress and other stakeholders. Generated 20+ articles in top tier business and political media on testimony alone. Congress passed bill to fix PPP application deadline problem.
 - Wrote bylines and blog for global CEO, CEO of Public Accounting, Chief Auditor and other executives.
 - Supervised media-driven public affairs campaign that resulted in IRS moving the 2020, 2021 tax deadlines.
- Led primary and secondary research initiatives to manage stakeholders, craft key messages and identify surrogates.
- Managed media relations and external messaging for 2021 acquisition of Business Learning Institute, EVP promotion to CEO of Public Accounting and hiring of EVP, Business Engagement and Growth.
- Developed thought leadership campaigns for senior executives, secured "most influential" award for CEO of Public Accounting and each quarter wrote messaging for 1,200+ person all-hands events and Board of Directors meetings.
- Created integrated risk mitigation plans in response to sensitive legislative and regulatory policies. Communicated with peers at largest accounting firms and influential trade groups to manage profession's message and achieve united voice.
- Represented enterprise on Alliance for Responsible Professional Licensing coalition, guided earned and social media direction and closely partnered with seven national association members who represented highly complex, technical professions.

Goldman Sachs (formerly Folio Financial, Inc.), September 2015-October 2018

Chief Communications Officer

Single-handedly led all strategic media and industry relations strategies for \$11B AUM fintech, custody and private market firm, created strong brand awareness and reputation that successfully positioned Folio for acquisition by Goldman Sachs.

- Increased 2016-17 media coverage by 56% and managed all in-house news bureau activities including:
 - Owned all media relations activities for annual 1,000+ attendee SRI Conference and multiple regional events.
 - Created Expert Interview podcast series, wrote scripts and managed production for 20 podcasts and blogs.
- Collaborated with CEO, CMO and sales team on business line planning, including value proposition development, integrated media relations, issue management, social media, thought leadership, case studies and measurement.
- Directed all communications for acquisitions of Hedgeable, LOYAL3 Securities and First Affirmative Financial Network. Developed and managed multi-channel external communications plan for each acquisition.
- Partnered with clients such as Pacific Life, Navy Federal Credit Union, Ellevest, Morningstar and Eaton Vance on high-profile PR activities and case studies to reinforce the value of Folio's services, strengthening Folio's multi-million dollar B2B pipeline.
- Created 15+ new relationships with industry consultants, including Forrester, Gartner, IDC and Celent.
 - Secured Folio's first-ever industry award: WealthManagement.com 2018 Industry Award.
- Ran communications for all executive hires, developed editorial calendars and internal key messages.

FleishmanHillard, March 2011-September 2015

Senior Vice President and Partner

Managed P&L for Corporate Reputation Group, held dotted-line management of ~20 globally dispersed FTEs, co-led North America Financial Service Practice Group and ran global, multi-million dollar client accounts.

- Past client work included Booz Allen, CFA Institute, EY, FDIC, State Street and Washington Gas.
- Cultivated and acquired new business relationships and generated more than \$3 million in revenue each year.
- Developed Washington Gas' financial media campaign, co-authored its 2014 annual report business overview, surveyed 10+ sell-side, buy-side analysts and portfolio managers to create stronger investor interest as a buy opportunity.
- Created and led media campaign to launch Booz Allen's commercial finance, auto and energy business lines, resulting in expanded B2B, B2G cyber security program across the Middle East and South East Asia.
- Relaunched EY Center for Board Matters with earned, paid media campaign, created social media presence for business leads.
- Oversaw global earned media campaigns to advance clients' surveys and data-driven thought leadership on topics such as data science, energy grid risk management, the unbanked/underbanked, nurturing innovation, corporate governance and ESG.
- Organized digital and earned media strategies for crisis scenarios such as data breaches, CEO transitions and physical threats.

CFA Institute, September 2006-March 2011

Director, Public Relations

- Oversaw all North and Latin American B2B, B2C and B2G media relations campaigns resulting in ~200 articles/quarter. Used testimonials, data visualization and thought leadership to support awareness of the global CFA exam program. Highlights:
 - Owned, ran media strategy for Dodd-Frank blue ribbon task forces led by former SEC and FDIC chairs.
 - Created first-ever investor education campaign, expanded program into Canada and Latin America.
 - Successfully launched CIPM credential and the Investment Foundations certificate program.
- Managed crisis communications for the global CFA exam, successfully protected the brand during executive transitions, physical threats, exam cheating, trademark lawsuits and severe weather situations.

PRIOR RELATED EXPERIENCE

- **Association for Investment Management and Research** - *Manager, Public Relations*
- **Virginia General Assembly** - *Legislative Assistant*

EDUCATION

- MBA, University of Maryland Robert H. Smith School of Business, College Park, MD
- BA, Political Science, Mary Washington College, Fredericksburg, VA