
2199 Stanich Street, St Paul, MN 55109

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SUMMARY OF

QUALIFICATIONS

- **Accomplished and Resourceful Financial Services Professional** with a proven record of executive, diversity, and sales leadership
- Extensive experience in financial product development and management
- Proficient in data analytics and advanced planning strategies
- Highly effective in working with National accounts
- Skilled communicator, presenter, and relationship builder at all levels.
- Dedicated and driven contributor, successful in achieving sales and revenue goals.

EXPERTISE

- **Operations and Sales Leadership**
- **Financial Product Management**
- **Financial Sales and Marketing**
- **Diversity and Inclusion Strategy**
- **National Account Management**
- **New Business Development**

EXPERIENCE

ASK SOLUTIONS, St Paul/Minneapolis, MN

Currently Contracted with **Passerelle Partners** (June 2023 to Current)

President, Business and Estate Planning Consultant April 2022 to Current

- Serves as point of sale executive for financial advisors and firms
- Serves as Advanced Life sales representative to help firms achieve effective estate and business planning for clients
- Serves as a strategy consultant for case coordination between firms and carriers

MIAMI LIFE (NEXTIER INSURANCE SERVICES), Miami, FL

Senior Vice President, Sales August 2018 to April 2022

- Served as operations and sales team leader
- Served as Advanced Life sales manager to help firms achieve effective estate and business planning for clients
- Served as strategy leader for domestic and international cases
- Served as sales relationship manager for Life carriers and lending partners

Highlights:

- Developed Foreign National Sales platform
 - Helped to build a Premium Finance lending platform through Nextier Bank
 - Served as Diversity Executive for Financial Alliance for Racial Equity

LION STREET, INC, Austin, TX

Advanced Life Sales Manager March 2016 to August 2018

- Served as an advanced life sales expert to help firms achieve effective estate and business planning for clients.
- Served as Premium Finance point of sale consultant.
- Provided new firm onboarding sales and sales strategy training.

Highlights:

- Helped to successfully onboard and grow 15 new partner firms
- Helped to consistently achieve annual sales goals for Lion Street and assigned firms

CLARENCE W. KNOX, JR.

Résumé of Qualifications

EXPERIENCE

SECURIAN FINANCIAL (Minnesota Life), St. Paul, MN

Senior Life Product Manager July 2010 to March 2016

- Worked closely with Advanced Marketing Counsel to achieve effective estate and business preservation for clients.
- Served as Key Accounts sales representative
- Served as project lead for life insurance product development and enhancements.

Highlights:

- Helped to increase sales production in 2 National accounts.
- Served as project lead in the development and implementation of 5 new Life products and 8 product enhancements
- Served on the Premium Finance and COLI business committees
- Lead Diversity Counsel and corporate initiatives

PRUDENTIAL FINANCIAL (Wachovia Securities, LLC, Carroll Enterprises), Plymouth, MN

General Agency Sales Manager / Product Manager July 1999 to January 2010

- Provided resourceful leadership as Marketing and Sales team manager
- Delivered business and estate planning presentations to financial advisors and clients, resulting in strengthened client-advisor relationships
- Provided financial planning strategy and presentations to financial advisors

Highlights:

- Successfully managed a team of 10 Marketing consultants to achieve sales goals for Life, Disability, and Long Term Care segments
- Developed the Marketing Team strategy in response to the company's changing focus as a multi-carrier distribution agency.
- Developed national training modules for MDRT and M Group Advisors to increase sales effectiveness.
- Lead Diversity Counsel and Corporate Diversity Initiatives programs

EDUCATION

FLORIDA A & M UNIVERSITY, Tallahassee, FL

Bachelor of Science in Business Economics

FLORIDA STATE UNIVERSITY, Tallahassee, FL

Certified Financial Planner Designation Program

LICENSES

- Life/Health License
- SIE

LEADERSHIP & RECOGNITION

- Board of Directors, Financial Alliance for Racial Equity (FARE)
- Board of Directors/ President, Crimson & Cream Foundation
- Board of Directors, University of Minnesota ACE Program
- Board of Directors, Operation De Novo

COMMUNITY SERVICE

- Minneapolis Urban League
- Volunteer, Second Harvest Heartland