

# RACHEL A. BENJAMIN, DBA

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## EXECUTIVE MANAGEMENT PROFILE

Cultivate Culture of Innovation & Differentiation ▪ Interpret Business & Market Insights ▪ Execute High-Impact Priorities

**Business and market visionary** with expertise in employing industry trends and business knowledge to build forward-looking, strategic business solutions for companies in evolving, fast-paced, competitive environments. **Transformational change leader** who is repeatedly entrusted to revitalize business priorities and refocus corporate direction for high-growth and turnaround operations. **Team and bridge builder** with success of assembling high-performance, diverse global teams and inspiring passion for excellence.

### Leadership Strengths - Core Competencies - Value Proposition

Strategic & Tactical Planning – Operational & Financial Turnaround – Global Marketing – Business & Market Growth  
Diversity, Equity & Inclusion – Deal Structuring & Negotiations – Team Leadership & Direction – New Market Development  
Visual Identity & Branding Strategies – Digital & Multimedia Communications – New Program Launches – P&L Management  
Marketing Research – Direct Marketing – Customer Segmentation – Strategic Partnerships & Alliances

## PROFESSIONAL EXPERIENCE

RJ FINANCIAL SERVICES ▪ Tampa, FL

2019 to present

HEAD OF ADVISOR INCLUSION NETWORK, PRIVATE CLIENT GROUP

**CHALLENGE:** Tapped by CMO to shape and influence company's strategic plan around diversity, equity and inclusion initiatives and raise its brand profile in highly competitive industry—work closely with executive leadership team on future-focused business goals.

- ▶ **STRATEGIC PLANNING & DIRECTION:** Entrusted to formulate growth strategy, oversee recruitment, retention and development of 3K financial advisors (\$20M P&L) and position company as industry leader to attract new advisors.
- ▶ **BUSINESS GROWTH:** Generated double-digit growth in assets by leveraging differentiated marketing capabilities and cultivating swift decisions that addressed unique business and operating challenges.
- ▶ **DIVERSITY & INCLUSION:** Drove accelerated cultural and operational changes that resulted in record, YoY growth of new diverse advisors joining the company.
  - Amplified impact and voices of diverse talent and reinforced inclusiveness with programs for underrepresented, LGBTQIA and special interest groups.
  - Introduced podcasts, newsletters, Black wealth summit, community outreach events and advocated corporate investment in social justice issues.
- ▶ **BRAND VISIBILITY:** Released end-to-end solutions including market research, brand development, new program launches, digital media and marketing.
- ▶ **BUSINESS DEVELOPMENT:** Realized 30% growth in viable prospects and tripled advisor engagement through targeted network marketing and digital strategy.

### Management Commentary

*"Rachel is a dynamic business leader that has the ability to work across the organization to solve our most pressing challenges by bringing together people, getting them aligned and empowers them to execute."*

*"Rachel brings vision and innovative thinking to everything she does and balances by delivering on what she says she is going to do."*

*"Rachel brings together a unique skill of financial services acumen and marketing strategy to her role."*

CARLTON TOWER INVESTMENT ADVISORS ▪ Tampa, FL

2017 to 2019

CHIEF MARKETING OFFICER

**CHALLENGE:** Hand-picked to help structure third largest acquisition in company's history and refine its brand management and global marketing strategies for \$10M portfolio—served on executive team and reported to President / Chairman.

- ▶ **GLOBAL MARKETING:** Restructured marketing functions and established a top-performing, award-winning marketing organization from scratch; originated company's global marketing and digital strategy in US, Canada and UK.
- ▶ **BUSINESS GROWTH:** Spurred company into new levels of growth and market expansion by executing highly focused strategic initiatives across key business functions and operations.
  - Doubled assets under management (\$32M to \$65M) through corporate acquisitions and grew team to 40 employees.
  - Augmented sales performance 35% by revamping CRM and enabling access to high quality customer leads.
  - Achieved double-digit sales growth by implementing company's first integrated marketing campaign.