

# Markell E. Byrd

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## MD - ENTERPRISE GROWTH ARCHITECTURE & AI STRATEGY

Visionary Senior Executive with nearly 20 years of enterprise-scale leadership overseeing \$100B+ portfolios across premier wealth management institutions. Pioneer in the architectural design, adoption, and deployment of agentic AI ecosystems and hyper-personalized client engagement platforms. Expert at translating complex behavioral data into scalable corporate growth engines, combining institutional governance with next-generation technology to accelerate asset velocity and advisor success across independent, RIA, and institutional channels.

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### KEY COMPETENCIES

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|--------------------------------|-----------------------------|------------------------------|
| Enterprise Growth Architecture | Agentic Mesh Architecture   | Wealth Management Ecosystems |
| Agentic AI Deployment          | Behavioral Data Analytics   | Data-Driven Scaling          |
| Platform Innovation Strategy   | Channel Migration Execution | Advisor Success Systems      |

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### PROFESSIONAL EXPERIENCE

#### Wells Fargo (Enterprise Wealth Management)

Nov 2021 - April 2026

##### Managing Director | Head of Affluent Markets

Led digital growth strategy for a premier national wealth management division, architecting brand and advisor platforms that leverage behavioral finance to capture the generational wealth transfer, accelerate revenue velocity, and expand market presence.

- **Data-Driven Growth:** Orchestrated an enterprise strategy delivering 13% YoY revenue growth and \$4.2B in net new AUM by professionalizing business development and field execution.
- **Platform & AI Adoption:** Directed the strategic implementation framework for advisors, driving seamless deployment and high-velocity corporate platform utilization.
- **High-Growth Architecture:** Engineered and launched a specialized Sports & Entertainment UHNW division and platform strategy, securing +\$700M in AUM within its inaugural year.
- **Executive Stewardship:** Served as chief strategic spokesperson and C-suite advisor, shaping regulatory communications and ensuring platform consistency across multi-billion-dollar business lines.

#### LPL Financial Services

Dec 2020 - Nov 2021

##### Assistant Vice President; Strategy, Innovation & Digital Platforms

Engineered the business solutions and digital practice management frameworks that empowered a network of 16,000+ independent advisors to modernize operations and accelerate growth through scalable digital engagement models.

- **Digital Referral Integration:** Co-architected and deployed the "Lead Assist" platform, establishing high-velocity digital referral ecosystems to capture strategic advisor-led revenue.
- **Data-Driven Practice Scale:** Directed behavioral analytics for the High Performer Profile publication, using data insights to eliminate bottlenecks and scale advisor capacity without adding headcount.
- **Startup Incubation & Scaling:** Deployed Lean Startup methodologies to architect an internal incubator framework, driving growth mechanisms from initial ideation, integration, and enterprise scale.

## UBS Financial Services

June 2016 - Nov 2021

### Associate Director; Digital Strategy & Platforms

Led the primary digital field communication and execution strategy for 6,000+ financial advisors, serving as the connective tissue between corporate digital vision and local market production.

- **Behavioral Change & Adoption:** Led the nationwide digital rollout of new practice growth strategies, achieving 100% messaging consistency and brand alignment across elite advisor offices.
- **Market Execution:** Partnered with top-tier advisor teams to implement high-impact digital business development playbooks, accelerating AUM and revenue growth in core markets.
- **Digital Transformation & Next-Gen Engagement:** Spearheaded the modernization of enterprise-scale WIM platforms, deploying high-frequency digital ecosystems and cross-cultural engagement frameworks that capture emerging demographics and accelerate generational market share.

## US Trust

August 2009 - June 2016

### Vice President; National Sales

Commanded the national evolution of advisor talent and client engagement strategy across 14 markets, overseeing HNW team development and pioneering mentorship frameworks for wealth leaders.

- **AUM Velocity:** Personally accelerated \$324M in new AUM by engineering an elite advisor onboarding and digital development program tailored for the high-net-worth segment.
- **Talent Stewardship:** Achieved a 100% success rate in advisor development across 14 major markets – proving that sustainable brand growth is a direct byproduct of elite talent cultivation.

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## INTELLECTUAL PROPERTY & THOUGHT LEADERSHIP

### Patent Innovation: "Pillars of Understanding" | U.S. Patent Application #[20260004354](#)

A proprietary AI-driven framework for hyper-personalized client engagement based on financial behaviors, core values, aspirations, pain points, and behavioral archetypes – the intellectual foundation of next-generation digital marketing and growth in wealth management.

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## INDUSTRY RECOGNITION & AWARDS

- **2025 InvestmentNews** – Wealth Management Trailblazer
- **2025 WealthManagement.com** – Thought Leadership Award
- **2023 InvestmentNews** – Rising Star (Next Gen Engagement + Cross Cultural Client Segments)
- **2022 Association of African American Advisors** – Top 50 Under 50

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Authorized to work in the U.S. · References available upon request