Markell E. Byrd

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MARKETING, COMMUNICATIONS & AI-LED DIGITAL TRANSFORMATION · WEALTH MANAGEMENT

Wealth management executive who turns strategy into adoption. Seventeen years across Wells Fargo, LPL Financial, UBS and U.S. Trust leading enterprise growth, marketing, field communications and generative-AI transformation in highly regulated channels. Serves as the bridge between business, analytics and technology teams: aligning Product, Risk and Compliance, translating ambiguous goals into funded roadmaps, and measuring value after launch. Inventor of Signals of Clarity™, a patent-pending AI framework for behavior-based client engagement.

$4.2B	$300M+	+13%	$700M+	22,000+
Net new asset opportunity identified	Funded in first three months	Realized revenue growth, Affluent Markets	First-year AUM, new UHNW division	Advisors on new digital platforms

CORE COMPETENCIES

- Generative AI Strategy & Delivery
- Personalization & Next-Best-Action
- Behavioral Analytics & KPI Design
- Omnichannel & Lifecycle Marketing
- Change Management & Adoption
- Stakeholder Alignment (Product, Risk, Compliance)
- Executive & Field Communications
- Go-to-Market & New Venture Launch
- Advisor & Client Experience

PROFESSIONAL EXPERIENCE

Wells Fargo, Enterprise Wealth Management — Nov 2021 – May 2026

Managing Director, Head of Affluent Markets – Strategy, Innovation & AI Transformation

Led growth strategy and AI transformation for the Affluent Markets segment of a multi-market wealth organization; primary business-to-technology translator for the division.

- **Enterprise growth:** Rebuilt organic growth around a prioritized segment, named channel owners and a weekly pipeline review, using predictive behavioral models that surfaced high-value client workflows; identified $4.2B in net new asset opportunity and converted $300M+ into funded accounts in the first three months of tracking, alongside 13% realized year-over-year revenue growth in Affluent Markets.
- **New venture launch:** Built a Sports & Entertainment UHNW division from concept, defining the segment thesis, advisor coverage model, referral engine and distribution strategy; secured $700M+ in AUM in year one; the program is now in its third year.
- **Generative AI delivery:** Led business scoping, vendor evaluation and cross-functional rollout of generative-AI capabilities and automated workflows, driving adoption across distributed field teams.
- **Executive communications:** Advised the C-suite on regulatory communication and platform consistency; authored executive summaries and dashboards that kept Product, PMO, Risk and Compliance aligned on priorities and trade-offs.

LPL Financial — Dec 2020 – Nov 2021

Assistant Vice President, Strategy, Innovation & Digital Platforms

Directed digital practice-management frameworks and delivery for a network of 16,000+ independent advisors.

- **Platform launch:** Co-architected, piloted and launched the “Lead Assist” digital referral platform with engineering, analytics and marketing, clearing launch blockers through deployment.
- **Behavioral analytics:** Owned baseline tracking and behavioral KPIs for the High Performer Profile initiative, using the insights to remove workflow bottlenecks and scale advisor capacity without added headcount.
- **Innovation:** Ran an internal incubator using Lean Startup and Agile methods, taking concepts from early ideation to enterprise-grade solutions.

UBS Financial Services Jun 2016 – Dec 2020

Associate Director, Digital Strategy & Platforms

Connected corporate technology teams with 6,000+ field users to maximize return on core sales and marketing platform investments.

- **National rollout:** Led change management, communications and training for next-generation platform rollouts to 6,000+ advisors, achieving 100% messaging consistency and brand alignment across offices.
- **Growth playbooks:** Turned advisor feedback into product enhancements and digital business-development playbooks that accelerated AUM growth across core markets.
- **Platform modernization:** Partnered with vendors and engineering to modernize legacy wealth platforms and build digital experiences for emerging client demographics.

U.S. Trust, Bank of America Private Wealth Management Aug 2009 – Jun 2016

Vice President, National Sales

Led national sales enablement, talent development and advisor distribution strategy across 14 regional markets.

- **Advisor onboarding:** Program-managed elite HNW advisor onboarding and digital enablement, resolving cross-functional deployment friction to accelerate $324M in new AUM.
- **Talent development:** Implemented tracking and accountability frameworks across 14 markets, achieving a 100% advisor development success rate.
- **Community & culture:** Co-chaired a Bank of America employee network that grew membership 400%.

INTELLECTUAL PROPERTY & FRAMEWORKS

- **Signals of Clarity™** — U.S. Patent Application No. 20260004354 (filed as “Pillars of Understanding”). AI framework for hyper-personalized engagement built on financial behaviors, core values, aspirations and pain points, resolved into behavioral archetypes that set message frequency, channel, tone and offer sequence. In a three-month live MVP: 1M+ new users, +80% click-through and +50% re-engagement of 90-day-inactive users.
- **Referability Assessment & Referrality Handbook** — Diagnostic and coaching program scoring 17 components of advisor referral readiness, with a strategy handbook and 90-day plan.

RECOGNITION

- 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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