

Translating Wall Street complexity and Silicon Valley velocity into narratives people actually care about.

Seventeen years turning enterprise strategy into field results across Wells Fargo, LPL Financial, UBS and U.S. Trust: growth, marketing, communications, digital and AI adoption, and new venture launches. Architect of proactive, empathetic advice.

\$4.2B

Net new asset opportunity
identified

\$300M+

Funded in first 3 months

+13%

Realized revenue growth,
Affluent Markets

\$700M+

Year-one AUM, new UHNW
division

22,000+

Advisors enabled, LPL & UBS

Record

Wells Fargo, Enterprise Wealth Management · Nov 2021-May 2026

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

Growth engine identified \$4.2B in net new asset opportunity, with \$300M+ funded in the first three months; +13% realized revenue growth in Affluent Markets; launched a Sports & Entertainment UHNW division (\$700M+ year one, now in year three); C-suite advisor on regulatory communication; generative-AI portfolio delivery.

LPL Financial · Dec 2020-Nov 2021 · AVP, Strategy, Innovation & Digital
Platforms

Co-architected the Lead Assist referral platform for 16,000+ independent advisors; High Performer Profile behavioral analytics.

UBS Financial Services · Jun 2016-Dec 2020 · Associate Director, Digital
Strategy & Platforms

Nationwide digital rollout to 6,000+ advisors with 100% message consistency.

U.S. Trust, Bank of America Private Wealth · Aug 2009-Jun 2016 ·
VP, National Sales

\$324M new AUM through advisor onboarding; 100% advisor development success across 14 markets.

Intellectual property

- Signals of Clarity™, AI framework for behavior-based engagement · U.S. patent application No. 20260004354 (filed as "Pillars of Understanding")

What I bring to your firm

Growth

A growth operating system: segment priorities, named owners, weekly cadence, banker-to-advisor referral flow.

Marketing

Behavior-based segmentation, compliance-ready advisor marketing kits, archetype-tuned content.

Communications

Field and executive narrative that turns announcements into adoption.

Digital & AI adoption

Use cases tied to revenue, pilot-branch programs, one-minute adoption dashboards.

New venture launch

Segments and offerings launched in 90-day sprints with clear scale gates.

Recognition

- 2025 InvestmentNews Wealth Management Trailblazer
- 2025 WealthManagement.com Thought Leadership Award
- 2023 InvestmentNews Rising Star
- 2022 Association of African American Advisors Top 50 Under 50