

Todd Walker

FinancialCopy.com

TODD M. WALKER

Financial Writer

Over 25 years of experience working with many of America's leading financial organizations -- including banks, insurance companies, investment firms -- marketing virtually every financial product/service imaginable. In-depth experience with both retail and institutional markets.

PROFESSIONAL EXPERIENCE

- **FinancialCopy.com**, Wells, Vermont. President (1999 – present)
Provide freelance marketing copy exclusively on financial products and services.
- **Walker Marketing**, Watertown, MA. President (1994 – 1999)
Headed my own marketing communications and direct response agency for financial service companies, publishers and other direct marketers. Winner of multiple *Folio* awards.
- **Watson Mail Communications**, Everett, MA. Vice President (1988 – 1994)
Managed a wide variety of direct mail campaigns for financial service companies, publishers and other direct marketers.
- **American Direct Mail**, Boston/New York. Sales Representative > Assistant VP > Vice President (1974 – 1988)
Over fourteen years, managed many direct mail projects for leading financial service companies, publishers and other direct marketers.

SERVICES

- Sales/capability brochures
- Direct mail
- Direct response (statement stuffers, space ads, Web banners, etc)
- Sales letters
- Fulfillment kits
- Broker/agent promotional materials
- Employee retirement plan marketing

- Branch/Investor Center/Seminar merchandising
- Newsletters/consumer education guides
- PowerPoints
- Shareholder/policyholder communications
- Web/Interactive content

LICENSES/REGISTRATIONS

- NASD Series 7, 66
- Registered Investment Advisor Representative
- Health, Life and Accident Producers License

AWARDS

- **Financial Communications Society 2009 Portfolio Award.** *Best of Show*, Interactive media. Client: **AXA Equitable**. (Campaign writer for PrimeLook Agency, NY.)
- **Financial Communications Society 2008 Portfolio Award.** Bronze, B2B Interactive/Web Advertising. Client: **John Hancock Funds**. (Campaign writer for PrimeLook Agency, NY.)
- **Financial Communications Society 2008 Portfolio Award.** Bronze, B2B Interactive/Web Advertising. Client: **ING Funds**. (Campaign writer for PrimeLook Agency, NY.)
- **2007 W³ Awards** (International Academy of the Visual Arts). Silver. Client: **Oppenheimer Funds**. (Campaign writer for PrimeLook Agency, NY.)
- **2007 W³ Awards** (International Academy of the Visual Arts). Silver. Client: **M&I Bank/M&I Wealth Management**. (Campaign writer for PrimeLook Agency, NY.)
- **2007 W³ Awards** (International Academy of the Visual Arts). Silver. Client: **ING Funds**. (Campaign writer for PrimeLook Agency, NY.)
- **Financial Communications Society 2007 Portfolio Award.** Silver, B2B Interactive/Web Advertising. Client: **ING Funds**. (Campaign writer for PrimeLook Agency, NY.)
- **Financial Communications Society 2007 Portfolio Award.** Bronze, B2B Interactive/Web Advertising. Client: **Oppenheimer Funds**. (Campaign writer for PrimeLook Agency, NY.)
- **Financial Communications Society 2006 Portfolio Award.** Silver, B2B Interactive/Web Advertising. Client: **ING Funds**. (Campaign writer for PrimeLook Agency, NY.)
- **2005 ASPC (American Society of Professional Communicators) Masters Communication Award.** Honorable Mention, Direct Mail. **Fidelity Investments** "2005 Workplace Savings Update".
- **IABC Colorado Bronze Quill Awards, 2005** (International Association of Business Communicators, Colorado chapter): Award of Merit, **Fidelity** 60-Second Retirement Challenge campaign (2005). (Wrote various elements of total campaign.)
- **PSCA Signature Awards, 2005** (Profit Sharing/401(k) Council of America): Award received for **Fidelity** 60-Second Retirement Challenge campaign (2005). (Wrote various elements of total campaign.)

- **Dalton Pen Award, 2004** for Copywriting Excellence. **Fidelity Investments** 403(b) plan participant flyer.
- **Gold Award, 2004 MarCom Creative Awards. Fidelity Investments** 403(b) plan participant flyer.
- **Best of Show (Direct Mail), Financial Communications Society 2004 Portfolio Award.** Client: **Morgan Stanley.** (Part of overall creative team at MBarry and Co, NY)
- **The Communicator Awards, 2004.** Award of Excellence. **Fidelity Investments** 60-Second Retirement Challenge (2004). (Wrote various elements of total campaign.)
- **Clarion Award of Excellence, 2004. Fidelity Investments** 60-Second Retirement Challenge (2004). (Wrote various elements of total campaign.)

FORMAL EDUCATION

Bentley College, Waltham, MA. B.S. in Marketing and Business Communications. High Honors. (1978)

Belmont Hill School, Belmont MA. (Preparatory School) Graduated with Honors. (1970)

MISCELLANEOUS

- Presented workshop at 2010 IFCA (Insurance and Financial Communicators Association) Conference (Montreal, QC): *One More Time: How Do You Get Prospects to Act.*
- Developed and presented IFCA (Insurance and Financial Communicators Association) webinar, “Effective Copywriting for Insurance and Finance”, April 28, 2009.
- Knowledgeable about graphic design, print production, direct mail production and postal requirements, Web design and production
- Registered Investment Representative and Insurance Producer
- Maintain extensive financial background files
- Proficient in researching financial background required for assignments
- Member: Financial Communications Society, New York, NY

Samples and References available upon request.

TMW/567