KARIM RASHWAN

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DIRECTOR OF PARTNERSHIPS

Partnership Management | Financial Services | Project Management

Strategic partnerships and business development leader with extensive experience driving overarching business growth. Known for enterprise sales and relationship management with a track record of turning partnership strategies into revenue streams. Creative problem solver, successful at identifying favorable business solutions that reduce organizational costs. Dynamic executive leveraging strategic thought leadership, analytical skills, creativity, and effective communication to motivate and influence key stakeholders. Strong individual contributor with proven ability to lead multifaceted teams to develop and drive long-term corporate vision.

- *Relationship Management*
- *Business Development*
- *New Product & Market Launch*
- *Product Governance*
- *Financial Planning & Analysis*
- *Market Share Growth*
- *Contract Negotiation*
- *Strategic Planning & Execution*
- *Team Training & Development*

***Technical Skills**: Microsoft PowerPoint, Word, Excel, Adobe Captivate, JIRA, Adobe Connect, Camtasia, Snag-it, Microsoft Teams, Zoom, Google Meets, WebEx*

PROFESSIONAL EXPERIENCE

2017 - PRESENT: ADVISORSTREAM LTD. A BROADRIDGE COMPANY - TORONTO, ON

MANAGING DIRECTOR (2018 - 2023)

Provide strategic direction and leadership to oversee a portfolio of publisher partnerships and contribute to 90% of the company value while tracking and securing new business opportunities to grow market share. Govern key wealth management accounts within U.S., Canada, UK, and Ireland. Coordinate management of analyst relationships to establish a strong market presence. Leverage industry knowledge and influencing skills to negotiate contracts. Act as subject matter expert to manage an average of 10+ RFPs per year.

- Promoted to establish flawless publisher partnerships, lead UK rollout, and ensure continued market growth.
- Championed new market launches in UK and Ireland by implementing innovative go-to-market strategies and leveraging UK advisors' technology for brand positioning.
- Generated over $200K in savings in licensing within two years by renegotiating publisher agreements; impacted bottom-line directly and increased profit margins by 7%.
- Acquired $100k enterprise deal in UK by developing and leading integration and commercial relationships with strategic partners serving 60% of the UK and Irish market.
- Represented the company at industry events in U.S., UK, and Canada with an audience of C-Suite and senior leadership.
- Cultivated publisher partner portfolio representing 60% of 2021 acquisition price; directed contracts with 25+ global brands, including The Wall Street Journal, Barron's, New York Times, Financial Times, Forbes, Bloomberg, and The Guardian.
- Orchestrated business strategies, driving 170% YoY growth at Canada's largest wealth management firm for three years.

DIRECTOR OF PRODUCT MANAGEMENT (2017 - 2018)

Defined the product roadmap and strategy in conjunction with development team to optimize projects and development efforts. Realized product success by identifying and integrating customer needs and business objectives into product roadmaps. Managed key accounts to establish loyalty and enable continued business by providing exceptional services. Advised account management teams to manage multiple RFPs per year.

- Sourced and implemented product management software to build out and manage roadmap.
- Commended by management for steering several functions and completing ad hoc assignments.
- Contributed to closing a deal with the largest financial services company in the U.S., generating $1M in annual recurring revenue.

2008 - 2017: WOLTERS KLUWER LIMITED - TORONTO, ON

PRODUCT MANAGER (2012 - 2017)

Directed end-to-end activities involved in product management of proprietary financial planning software, including roadmap planning, marketing strategies, product positioning, and revenue generation. Organized trade shows and conducted presentations to attract larger clientele while leveraging market research to target specific client segments. Recognized by senior leaders for driving product enhancements based on voice of customer. Contributed to the success of cross-functional projects by using Agile and Scrum methodologies.

- Promoted to Product Manager to drive product growth and increase annual software subscription revenue; exceeded $200K revenue target YoY by generating $215K in one year and $330K by 2017.
- Navigated the transition from desktop to cloud based platform by leading the project and organizing team trainings.
- Utilized financial skills to oversee RFP and RFI management and apply planning tool, boosting sales from $500K to $1.2M.
- Secured +1.3K clients by spearheading client acquisition campaigns in partnership with sales and marketing departments.

TRAINING MANAGER (2008 - 2012)

Oversaw all facets of software training to external advisors by exhibiting exceptional product knowledge and communication skills. Advanced training efforts by managing documentation, organizing webinars, and conducting road shows. Deployed e-learning and in-person training by advising and coordinating with internal and external teams.

- Developed and deployed FP Solutions training for advisors to educate best practices and appropriate product usage.
- Created materials for technical training and specialized case consultation while delivering online and in-person training sessions to individuals and financial institutions across Canada.
- Exceeded training revenue target of $50K YoY by generating up to $75K.

2004 - 2008: CIBC - TORONTO, ON • **FINANCIAL ADVISOR**

Managed key accounts of personal and corporate clients while providing expert advice to meet banking, credit, and investment needs. Translated business needs of high net-worth clients into financial plans. Defined and deployed long-term strategies for client businesses to drive continuous growth.

- Won the 2007 First Quarter Achiever award as one of the top five advisors to achieve $2M asset growth in one quarter.
- Exceeded annual asset growth targets of $8M while managing $55M book of business.
- Received positive feedback for minimizing financial risks and ensuring business stability through financial planning.

EARLY CAREER

INVESTORS GROUP - TORONTO, ON • **FINANCIAL ADVISOR**

- Developed book of business from zero to $12M in four years.

LIPTON WISEMAN ALTBAUM & PARTNERS - TORONTO, ON • **ACCOUNTANT**

- Coordinated onsite audits of private and public companies and created annual financial statements and tax returns.

SIEMENS AG - ERLANGEN, GERMANY • **JUNIOR INTERN**

- Analyzed financial requirements of various global electrical engineering projects.

EDUCATION & CERTIFICATIONS

BACHELOR OF COMMERCE (HONORS) | **I.H. ASPER SCHOOL OF BUSINESS, UNIVERSITY OF MANITOBA**

CERTIFIED FINANCIAL PLANNER | **CANADIAN INSTITUTION OF FINANCIAL PLANNERS, TORONTO, ON**

PROFESSIONAL FINANCIAL PLANNING COURSE | **CANADIAN SECURITIES INSTITUTE**

CONDUCT & PRACTICES HANDBOOK |**CANADIAN SECURITIES INSTITUTE**

CANADIAN SECURITIES COURSE | **CANADIAN SECURITIES INSTITUTE**

INVESTMENT FUNDS INSTITUTE OF CANADA COURSE

AFFILIATIONS

GUEST LECTURER | **YORK UNIVERSITY, SCHULICH SCHOOL OF BUSINESS**

LANGUAGES

ENGLISH – FLUENT | FRENCH – PROFESSIONAL | GERMAN & ARABIC – BASIC