Carrie Ewart

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Professional Summary

14 years building, managing, and developing credibility while coaching and motivating teams of sales and finance professionals. Excel at building national accounts/contacts, driving business development initiatives, and strategic development buildouts. Advise and report regularly to senior leaders as a trusted and respected leader. Ability to encourage other's performance to drive and execute organizational expectations and objectives. Capable of clearly expressing ideas with both supportive and oppositional stakeholders. Skilled at integrations, transformations and is an innovative problem solver. Engaging and motivating audiences 1,000+ at employee rallies, conferences, and events.

Professional Experience

CA-3, Limited, Toronto, ON — **January 2019 – Present**

- **Owner and Principal**
  - Provide guidance regarding improving client's business operations and revenue performance
  - Determine issues to be resolved, design appropriate solutions and help manage company growth

CLIENT PROJECTS:

White Glove, Birmingham, MI (project duration: **February 2019 – Present**)

- **Head of Client Relations and Market Development** (04/2020 – Present)

Responsibilities:

- Identify new strategic opportunities and target prospects
- Assist financial, insurance and estate planning Advisors succeed with client acquisition strategies
- Perform competitor research and analysis in FinTech companies
- Development of account based and B2B marketing programs
- Produce educational seminars, webinars, appointments, social media, and digital media for clients
- Deliver live/virtual presentations to key accounts and syndicate partners both nationally and regionally
- Speak at conferences, road shows, advisor group sessions and industry event venues
- Provide training on strategies and best practices for business growth:
  - Presentation skills
  - Lead generation, lead engagement, lead nurturing
  - Client life cycle
  - Harness industry research and trends to develop courses to help Advisors stand out in their market
  - Partner with industry experts to leverage subject matter expertise
- Deliver "voice of the customer" training to White Glove's sales, product, and technical teams
- Work with Broker Dealers, IMO's, FMO's, RIA's, MGA's in Canada and the U.S. to deepen and grow relationships
- Educate firms about the evolution of digital marketing and automated marketing solutions
- Experienced with SaaS delivery solutions
- Achieved quarterly account revenue growth targets and strategic goals

Projects:

- Successful creation and rollout of a co-op marketing/subsidy program with partnering fund companies
- Provided solution to discontinue pricing services at a discount, and removed pricing barrier to entry
- Created format and path for Advisors to receive, training/coaching, round tables, and access to best practices

Accomplishments:

- Generated revenue: 2019 $6.3M, 2020 $3.3M, 2021 $4.2M, 2022 YTD $3.2M
- Increased client relations team revenue by 45%
- Strengthened relationships with executive-level clients and key accounts

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- **HEAD OF BUSINESS DEVELOPMENT** (02/2019 – 04/2020)

RESPONSIBILITIES:
- Gathered and organized information about markets in Canada to determine best marketing tactics
- Interviewed personnel and visited businesses to determine effective strategies to implement Canadian rollout
- Analyzed financial market, business, and other data to determine best courses of action to maximize revenue
- Action plans included: procedures, internal systems, physical equipment, and operational personnel needed
- Developed and delivered reports and presentations of results at internal and external meetings
- Provided training as needed, related to hiring and outcome measurements
- Canadian keynote speaker on behalf of the company, to audiences up to 1,000+

PROJECTS:
- Spearheaded 2 Canada-wide thought leadership and networking road shows, uniting prospects, and COI's

ACCOMPLISHMENTS:
- Successfully entered Canadian Market within 12 months
- Established 10 key accounts, 200 COI's and over 2,500 prospect leads

IMPACT ACCOUNTING AND FINANCE, TORONTO, ON (PROJECT DURATION: **MARCH 2021 – JUNE 2021**)

RESPONSIBILITIES:
- Developed and presented recommended business development strategies, and incentive plans
- Consulted on re-branding solutions
- Helped define target client profile based on market data

BANK OF NOVA SCOTIA, TORONTO, ON **APRIL 2008 – JANUARY 2019**

- **SENIOR MANAGER**, Major Accounts Group (12/2017 - 01/2019)

RESPONSIBILITIES:
- Responsible for Scotiabank's largest N. American global corporate bank and financial institution relationships
- Accountable for wholesale treasury management, product fulfillment and transactional operations
- Continuous improvement mindset to streamline processes, KPI's and OPC measurements
- Implemented practices and presented results to peers, senior leaders, executives, and operational management
- Executed within established operational performance commitments

PROJECTS:
- Facilitated monthly reporting round table on end-to-end process management of client onboarding

ACCOMPLISHMENTS:
- Led a high-performance operations team of 38
- Closed 100% of all audit issues on schedule

- **MANAGER PERSONAL/SMALL BUSINESS** (06/2014 - 12/2017)

RESPONSIBILITIES:
- Recruited, hired, and developed a team of Canadian retail financial and small business Advisors
- Provided development coaching and performance feedback to financial and small business Advisors
- Implemented marketing/sales campaigns to retain and grow retail and small business books
- Collaborated with partners across multiple business lines for referral opportunities and talent acquisition

PROJECTS:
- Charitable bank initiatives – organized 2017 Scotiabank Team, Strides for Stroke, raised $26k with match

ACCOMPLISHMENTS:
- Contributed to the profitable growth and retention of a retail/small business portfolio of >$500M
- Team ranked 1st in the District FY16 and FY17

- **SMALL BUSINESS ADVISOR** (06/2012 - 06/2014)
  RESPONSIBILITIES:
  – Retention and growth of 400+ retail high-value professional and small business owner relationships
  – Developed and maintained knowledge of client base encompassing types-of-business, and financial positions
  – Provided custom solutions, investment strategies, trade services, cash management and credit facilities
  ACCOMPLISHMENTS:
  – 2013: Achieved 157% of plan ($14M total small business sales), insurance penetration 273% of plan

- **SENIOR FINANCIAL ADVISOR** (12/2010 - 06/2012)
  RESPONSIBILITIES:
  – Retention and growth of retail book of business encompassing Canadian high-net-worth clients
  – Provided: portfolio management, product based solutions and aided in the achievement of financial goals
  ACCOMPLISHMENTS:
  – 2011: exceeded sales goal by 42% ($17.7M total retail sales)
  – 2011: insurance penetration growth of 87%, goal was 38%

- **FINANCIAL ADVISOR** (04/2008 - 12/2010)
  RESPONSIBILITIES:
  – Provided retail banking clients customized solutions, borrowing strategies, investment and market ideas
  – Developed business contacts, and maintained existing relationships
  ACCOMPLISHMENTS:
  – 2009 and 2010: exceeded annual goals of $7M credit sales, $850K investment sales

EDUCATION

YORK UNIVERSITY, TORONTO, ON 2008
- **B.A. BUSINESS STUDIES, HONORS**

SCHULICH SCHOOL OF BUSINESS, TORONTO, ON 2008
- **CERTIFICATE IN BUSINESS FUNDAMENTALS**

PROFESSIONAL DEVELOPMENT

CANADIAN SECURITIES INSTITUTE
– Branch Compliance Officer’s Course (BCO) 2014
– Financial Planning II Certificate 2013
– Small Business Banker Certification 2012
– Financial Planning I Certificate 2011
– Investment Funds in Canada Certificate 2008