

# Robert D. Bush

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## *Talented Financial Management professional with exceptional Sales and Management skills*

- Over nine years of Financial Management experience.
  - Familiar with managing high net worth accounts.
  - Consistent record of growing territories and portfolios.
  - Knowledgeable in high net worth estate / tax planning.
  - Proven ability to increase sales and revenue.
  - Adept at leading and training sales teams.
  - Excellent presentation/communication skills.
  - Previously held multiple NASD registrations.
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## **PROFESSIONAL EXPERIENCE**

**Windsor Financial Group LLC**, Minneapolis, MN 1996 – 2003

### *Director of Sales (2002 – 2003)*

- Coordinated efforts of six portfolio managers, responsible for entire Minnesota territory as well as large number of national accounts. Company focused on high net worth clients of over \$1,000,000.
- Developed policies and sales strategies to increase funds under management, acquire new clients, and motivate portfolio managers, while concurrently performing individual sales.
- Acquired \$66 million in new assets through personal sales between 2002 and 2003.
- Managed total of \$254 million in assets, accounting for 45% of company's total \$450 million assets under management.
- Created and implemented "Campaign 2005," marketing / sales plan designed to increase assets under management by specific goals each year from 2002 to 2005. Plan included increased use of referrals, improved training, and motivational techniques.
- Produced \$89 million in additional assets in first year, exceeding \$60 million goal.
- Responsible for 143 of company's 295 high net worth relationships (48%).

### *Vice President (1996 – 2002)*

- Marketed company's services and products to high net worth accounts of \$500,000 and up, primarily high net worth individuals, pensions, and foundations.
- Generated and qualified leads, utilizing outside referral sources (attorneys, accountants, etc.), networking, community marketing, and cold calls. Prepared and conducted seminars.
- Averaged over \$37 million in new assets each year for five years, including producing \$58 million in 2000 and \$52 million in 2001.
- Consistently exceeded all goals, increasing assets under management year over year.

**Prudential Securities**, Minneapolis, MN 1995 – 1996

### *Stockbroker*

- Carried out sales and marketing of stocks, bonds, mutual funds, annuities, and life insurance.
- Grew portfolio of assets under management to more than \$5 million.

**Paine Webber**, Minneapolis, MN 1994 – 1995

### *Stockbroker*

- Managed portfolio of accounts, providing sales and marketing of products and services.
- Built assets under management to more than \$6 million.

## **EDUCATION**

**BA in Business Administration**, St. Norbert College, De Pere, WI (1994)

## **LICENSES**

Previously held Series 7, 63, 65, and Minnesota Insurance Sales licenses

## **COMPUTER SKILLS**

Windows, Word, Excel, Access, Bloomberg