BRIAN J FREEMAN, CIMA ®

Strategic Investment Management Consulting for Optimal Distribution Success

(727) 215-7022

Brian.Freeman@FreemanIMC.com

Richmond, VA

FREEMAN

As a results-driven consultant, partner with me to leverage 20 years of expertise in asset management sales, with a focus on strategically positioning and distributing mutual funds and SMA's across BD's, IBD's, RIA's, and institutions. Significant experience in direct sales, managing sales teams, and implementing business intelligence tools. I played a key role in driving sales infrastructure development and contributed significantly to personnel decisions and acquisitions at Raymond James Investment Management. Notably, I have successfully contributed to growing AUA from 13 billion to 70 billion, showcasing a proven track record of collaborating with portfolio managers to raise assets.

EXPERIENCE TIMELINE

Fintech Training Specialist
Raymond James Financial

Director of Internal Sales
Raymond James Investment Management

SVP, Associate Director of Sales/Head of Affiliate Sales/Head of Sales Data Analytics
Raymond James Investment Management

2004 2005 2006 2007 2008 2009 2010 2011 2012 2013 2014 2015 2016 2017 2018 2019 2020 2021 2022 2023 PRESENT

Internal Sales Associate
Raymond James Investment Management

President and CEO of Carillon Fund Distributors
Raymond James Investment Management

National Accounts & Data Analytics
The London Company

EDUCATION

UNIVERSITY OF NORTH CAROLINA AT GREENSBORO MAY 1999

BACHELOR OF SCIENCE – INFORMATION SYSTEMS AND OPERATIONS MANAGEMENT

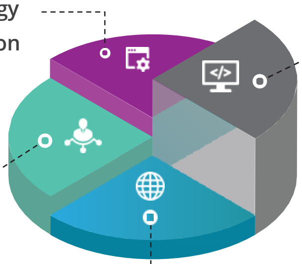
4 YEAR STARTER ON DIVISION I SOCCER TEAM (2 YEAR CAPTAIN)

ACHIEVEMENTS

PROFESSIONAL SOCCER PLAYER FOR RALEIGH CAPITAL EXPRESS AND CAROLINA DYNAMO

FINRA – SERIES 7, 66, 26 (CRD NO: 4775810), CIMA ®

AREAS OF FOCUS



PERSONAL ATTRIBUTES

Growth

Integrity

Progressive

Curiosity

PROFESSIONAL HIGHLIGHTS

- Lead National Accounts and Data Analytics efforts at The London Company
- Responsible for the coordination and execution of sales efforts between 5 Affiliates (11 Portfolio Management Teams) and all Raymond James Investment Management sales channels
- Key team member specializing in acquisitions integration
- Managed sales analysts who were responsible for sales and activity accountability metrics, as well as client segmentation through utilization of CRM and Tableau
- Responsible for developing sales and marketing strategies to distribute funds across multiple platforms
- Oversee all compliance, financial and administrative functions of the distributor
- Managed 15-person sales desk responsible for supporting external sales force which raised $4 billion in annual Mutual Fund and SMA sales
- Established and managed a 5-person team of internal client retention specialists
- Worked closely with National Sales Manager on sales and activity metrics for both internal and external sales force
- Internally managed the top retail territory of Eagle with $350 million in annual sales
- Covered US Southern coastal region as a hybrid wholesaler