Brett Benjamin

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INVESTMENT PROFESSIONAL

Accomplished investment professional with over 14 years of experience in the financial services industry. ▪ Highly skilled at wealth management, product management and investment management. ▪ Spent majority of career in client facing roles with focus on building relationships and providing superior service. ▪ Career marked by selling investment products and strategies. ▪ Investment product, strategy and market expertise with comprehensive knowledge across asset classes and product structures. ▪ Excellent communicator and presenter with experience in front of many client types. ▪ Strong, analytical, research and technical skills. ▪ Pursuing CFP® Certification.

PROFESSIONAL EXPERIENCE

AREA Real Estate Advisors, Kansas City, MO — January 2020 to Present
Vice President, Director of Analytics

- Director of Analytics providing data analytics, reporting and market research to AREA's brokerage teams and clients.
- Member of office brokerage team focused on leasing and investment sales.
- Lead thought leadership efforts for company including market reports, commentary and client presentations.

American Century Investments, Kansas City, MO — October 2018 to November 2019
Regional Associate - Investment Sales

- Member of regional sales team that supports intermediary investment sales of American Century mutual fund family, ETF's and retirement products.
- Focused on business development, product research, competitive intelligence and CRM management.

Ivy Investments, Waddell & Reed, Greater Kansas City Area — May 2011 to January 2017
Associate Client Portfolio Strategist | January 2015 to January 2017

- **Key liaison and representative between the firm's investment management teams, internal partners and the firm's clients with a focus on the firm's fixed income strategies, income solutions and public equity REITs.**
  - Represented the firm's investment philosophy, strategies and products to internal and external constituents.
  - Communicated the firm's investment and risk management process, product/strategy positioning, and market outlook.
  - Provided investment solutions, custom data and reporting, market knowledge and product/strategy guidance to retail, insurance, and institutional clients.
  - Consulted with sales teams and relationship managers to assist in business development efforts including product sales support, sales/market analytics, industry trend analysis, competitive analytics, portfolio construction and asset allocation.
  - Conducted presentations and calls with clients, prospects and internal partners focusing on product and strategy updates, investment solutions and market updates.
- **Drove business development and sales growth as the firm's representative delivering presentations, pitching investment strategies/products and conducting over 250 conference calls with clients and prospects.**
  - Represented the firm at industry conferences, including panels and breakout sessions, on topics spanning the global capital markets as well as educational sessions on financial planning, portfolio solutions/products, and industry trends.
  - Collaborated with national/strategic accounts teams, intermediary distribution, and institutional relationship managers to pitch strategies and products to research analysts, gatekeepers, consultants, financial advisors, banks, and RIAs.

Ivy Investments, Waddell & Reed

Product Manager | May 2011 to January 2015

- **Managed multiple aspects of the firm's fixed income investment products and strategies.**
    - Collaborated across multiple business units to support and maintain product lines. Analyzed competitor and industry trends, as well as sales and fund flow data for optimal product positioning, marketing, and management. Worked with data and performance teams to support sales efforts and respond to internal and external data requests and questions.
- **Consulted with internal and external wholesalers, sales executives, institutional relationship managers and national/strategic account teams to drive sales and business development efforts.**
    - Supported firm's business development efforts through sales and business planning, marketing initiatives, product and sales analytics, industry trend analysis, competitive analysis and investment strategy and product alignment.
    - Partnered with the firm's national/key account teams to help position the firm's fixed income investment strategies and products to best align with the focus of our partner firms and institutional consultants. This included participating in the sales and due diligence process to achieve platform placement, model allocation and research recommendations.
    - Partnered with marketing and communications to position products effectively and create messaging and marketing collateral including training materials, presentation decks, commentaries and sales materials.
- **Played key role in launching firm's first closed-end fund, Ivy High Income Opportunities Fund (IVH).**
    - Partnered with investment management and sales to bring HY credit closed end strategy to market through IPO. Presented competitive analysis and sales plan to firm at product launch meeting and assisted in capital raise as only team member outside of investment team invited to participate on a national roadshow that raised ~$370M.

J.P. Morgan Private Bank – Global Wealth Management, Chicago, IL July 2008 to September 2010

Investment Assistant

- As a member of Chicago Financial Leaders team, provided comprehensive investment management services to ultra-high net worth clients as well as small/middle market companies. Communicated with clients daily and provided recommendations on fixed income securities, cash management, and alternative investment products. Communicated J.P. Morgan market views and opinions to clients and prospects through conference calls, meetings and distribution of materials and commentary.

Northern Trust – Northern Trust Wealth Management, Chicago, IL April 2005 to August 2007

Investment Associate

- Partnered with senior portfolio managers to provide investment management services to ultra-high net worth clients. Supported discretionary portfolio management through portfolio rebalancing, client directed trading and cash management. Focused on supporting client service efforts while also assisting in sales and business development. Prepared portfolio analysis and performance reviews for current clients and presentation decks for prospects.

EDUCATION & LICENSES

Tulane University, A. B. Freeman School of Business - New Orleans, LA

Bachelor of Science in Management, Major in Finance – December 2003

FINRA Series 7, FINRA Series 66 Licenses

State of Kansas Licensed Real Estate Salesperson