



**CLARK D. BROWN**

**Executive Vice President, Cannon Financial Institute**

**Athens, GA**



**About Clark**

Clark is one of the most enthusiastic, energetic and entertaining presenters in the business. Whether in the boardroom presenting to your executive management team, or on the main stage of your national sales conference, Clark's style connects with everyone. His message is always clear and actionable.

In addition to training and coaching Clark keynotes at industry gatherings, speaks regularly to wealthy clients on behalf of financial firms, and writes for industry publications.

Clark is one of the owners of Cannon Financial Institute. He began his career as a Municipal Bond salesman in the mid eighties. He has worked both as a Financial Advisor on a brokerage platform and as a Private Banker on a wealth management platform. Clark's product management experience involved developing, launching and building an open architecture wrap investment management program. His sales management experience involved leading, managing and coaching a team of investment management and trust sales professionals.

Since 1998 Clark has continued to serve the financial services industry and the individuals and families they serve by providing the thought leadership required to execute and deliver results in a dynamic and changing environment.

Clark brings powerful analytic skills and creative problem solving to his consulting engagements. He is routinely the lead consultant on Cannon's most significant and challenging consulting projects. He has a proven track record of success. Clark will lead your team through a disciplined process of discovery, analysis, design, implementation and ongoing sustainment.

Clark resides in Athens, GA. with his wife and three children.

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### **Professional Experience**

#### **Regional Vice President (1995 - 1998)**

*Bank of America, Private Bank*

*Los Angeles, California*

Managed and coordinated delivery of Private Banking services through three sets of distribution channels including retail brokerage BAIS, Premier Banking, and Retail Banking Centers. Duties included product and sales training, referral resource management programs, developing marketing plans, and client contact.

#### **Vice President, Product Manager (1991 – 1995)**

*City National Bank*

*Beverly Hills, California*

Managed the product development for the Investment Management & Trust Services unit of City National Bank. In 1991, successfully lead the development, launch and sustainment of one of the first bank sponsored mutual fund asset allocation wrap fee programs in the country. The success of this initiative received national recognition from a variety of industry observers including; VIP Forum, Spectrum, and the Wrap Industry Conference. Responsibilities included product development, sales management and multiple product distribution across all bank channels.

#### **Vice President, Senior Investment Officer (1984 – 1991)**

*Security Pacific National Bank*

*Los Angeles, California*

*San Francisco, California*

Began as a Fixed Income Broker in the Municipal Bond Department of Security Pacific National Bank's Capital Markets Group. Subsequently lead the developed a HNW retail sales program to serve the clients of the Corporate and Commercial Bank. Lead the opening of various offices for the retail investment unit.

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### **Primary Training and Consulting Areas**

- Strategic Plan Implementation and Execution
- Sales Management and Coaching
- Sales Process and Performance Planning
- Relationship Management
- Wealth Management Sales Skills & Technical Knowledge
- Private Banking
- Business Banking
- Investment Management Product Development
- CRM Systems Implementation, Training and Adoption

### **Educational Background**

B.S. Business Administration, University of Southern California  
Bank of America Certified Private Bank and Investment School  
Various Associations delivered Credit and Financial Planning Programs

### **Professional Designations and Licenses Held**

- Certified Wealth Strategist
- Certified Private Banking and Investment Specialist
- NASD Series 7 General Securities Representative
- NASD Series 6 Investment Company and Variable Contracts Products Representative
- NASD Series 52 Municipal Securities Representative
- NASD Series 63 Uniform Securities Agent
- Life Agent California Department of Insurance Life Agent