

# Stefanie Shelley

## Principal

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### **Chief Marketing Officer – Operating Executive – Growth – Transformation**

Ms. Shelley is a long time Chief Marketing Officer and Operating Executive in financial services and tech-driven business solutions. Ms. Shelley's passion is working with CEOs and C-Suite leaders on strategies to drive growth, transformation and value creation. Ms. Shelley has a unique blend of marketing and general management experience with the ability to see the "big picture" and align for growth. She helps clients see their vision and opportunities in a different way and find the best solution to build a path forward and deliver success. Ms. Shelley has extensive experience in marketing, product, strategy, client experience, sales and human capital management. Highly effective in:

- Global Marketing
- Strategy
- Branding
- Digital Marketing
- Marketing Automation
- Communications
- Public Relations
- Thought Leadership
- Product Management
- "Fractional CMO"
- Client Experience
- Sales
- Digital Transformation
- Human Capital Management
- Organizational Design
- Talent Management
- Coaching & Facilitation
- Change Management
- Strategic Thinking
- Operational Planning
- Critical Thinking
- Problem Solving
- Sense of Urgency
- Emotional Intelligence
- Presentation Skills
- Communication Skills
- Board Experience

### **HIGHLIGHTED CAREER ACHIEVEMENTS**

- Work with CEOs and C-Suite leaders on strategies to drive growth, transformation and value creation. Work includes advisory services to a range of companies, from small to large cap along with private equity firms and their portfolio companies.
- Extensive experience in executive roles in the evolution of digital transformation from 1996 to today. In 1996, garnered the name money.com and launched a first-time personal finance website with calculators for Money magazine.
- Launched first time online banking at JP Morgan Chase and built a \$10mm venture, leveraging online banking and other digital solutions for small businesses.
- Led repositioning of a \$15B global provider of technology, data and analytics solutions with an integrated marketing strategy. Built a marketing function from the ground up and led a transformative repositioning with a steady flow of acquisitions and significant investments in blockchain and AI/machine learning technologies.
- Built a highly diverse global marketing organization, from start up to 55-person team with associates in Canada, Europe, Asia and India. Doubled revenue from \$2B to \$4B and more than tripled the stock from \$20 to \$70/share.
- Led Capital One's expansion into the banking space, with three large regional bank acquisitions and a 750- branch network. Led a 50-person team and grew first time digital bank balances >20% and new accounts in the branch footprint >30%.

### **EMPLOYMENT SUMMARY**

<b>Edgewood Growth Consulting</b>	<b>2017 – Present</b>
<b>Broadridge Financial Solutions</b>	<b>2010 – 2017</b>
<b>Capital One</b>	<b>2007 – 2009</b>
<b>Citibank</b>	<b>2006 – 2007</b>
<b>JP Morgan Chase</b>	<b>2000 – 2006</b>
<b>Smith Barney</b>	<b>1998 – 2000</b>
<b>Money Magazine</b>	<b>1996 – 1998</b>
<b>GE and GE Capital</b>	<b>1991 – 1996</b>
<b>APM (management consulting)</b>	<b>1989 – 1991</b>
<b>Bankers Trust Company</b>	<b>1984 – 1987</b>