MATTHEW D. SIEL, QPFC

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Professional Summary

Seasoned Business Development Executive Leader with over 20 years of experience accelerating growth and profitability in highly competitive markets. Extensive experience in all aspects of new product and channel expansion including new market penetration, key client relationships, account acquisition and development, target marketing, team development, and contract negotiations. Exceeds expectations by building valuable relationships and works well with people at all levels of an organization.

Skills

- Strategic Business Planning & Execution
- B2B Sales & Business Development
- New Products & Market Development
- Client Growth, Loyalty & Retention
- Market Research & Opportunity Analysis
- Organizational Leadership & Sales Management
- Forecasting, Budgeting & Financial Ownership
- Consultative, Analytical, & Strategic Selling
- Account Development & Acquisition
- New Channel Acquisition & Market Penetration
- Contract Negotiations & Management
- Strategic Partnerships & Networking
- Proactive & Responsive Customer Service
- Excellent Verbal & Written Communication

Selected Accomplishments

- ✓ Maintained an average annual sales closing rate of 75% and achieved a personal best selling $78M in assets in 2014.
- ✓ Developed new business within newly penetrated Michigan market requiring an additional full-time business developer.
- ✓ Consistently exceeded annual 20% growth goal and developed $120M in the Holland, Michigan market in 3 years.
- ✓ Averaged a new assert capture between $30M and $50M annually, with a closing rate of 85%.
- ✓ Successfully cultivated municipality relationships to generate new business in first-time industry segment for the company.
- ✓ Appointed Business Building Liaison and successfully developed a high net worth target market of assets exceeding $1M.

Work History

Vice President, Retirement Plans Sales, Michigan – Greenleaf Trust – Kalamazoo, MI 01/2012 to 12/2021

- Created and oversaw implementation of all strategic sales and marketing plans for the Retirement Plan Division.
- Promoted to lead sales initiatives and develop new business for the Retirement Plan Division for the state of Michigan.
- Led, mentored, and coached a motivated team of 7 sales representatives including providing performance evaluations.
- Fostered strong relationships with key clients and channel partners in existing markets and generated strong referrals.
- Developed business plans by monitoring competition and forecasting market trends, threats, and opportunities.
- Evaluated and rapidly responded to market changes by adjusting strategies or realigning priorities accordingly.
- Led division in its most successful year in corporate history by exceeding the record for acquiring new retirement plans.
- Achieved designation as a Super User for Salesforce.com and top 20 user of prospecting resource, JudyDiamond.com.
- Oversaw territory valued at $1.4B in annual sales and improved margins by over 2% through successful negotiations.
- Contributed as the social media leader within division in coordination with Shoefitts Marketing out of Portland, OR.
- Sold the largest retirement plan in corporate and career history at $50M while focused on new business in the Detroit area.
- Managed new sales in custody management, retirement services, personal trust, foundation, and endowment accounts.
- Wrote proposals for new and existing clients, identified and set company goals, and created plans to achieve goals.
- Created and implemented the Business Development Officer Dashboard that helped streamline the sales process.
- Capitalized on business opportunities by identifying prospects from retirement plan data analytics software programs.
- Served as the primary contact for new publicly traded bank referral partnership.
- Elected to internal Salesforce Committee, designated in-house expert.

Additional Work History

Sales Director – Omega Investment Management

Vice President, Business Development – Greenleaf Trust

Trust Relationship Officer – Greenleaf Trust

Assistant Vice President – Huntington National Bank

Regional Sales Manager – Huntington National Bank

Senior Trust Consultant – Huntington National Bank

Team Leader – Fidelity Investments

Director of Pension Administration – Actuarial Benefit Administrators, Inc.

Pension Administrator – Actuarial Benefit Administrators, Inc.

Allocation Analyst – Old Kent Bank

Allocation Accountant – Michigan National Bank

Internal Auditor – First Michigan Bank

Technical Skills

Salesforce, LinkedIn, Office 360 Suite, Apple Technologies, TimeBoxing, Judy Diamond & Associates software expertise

Training, Licenses & Certifications

- Qualified Plan Financial Consultant (QPFC) Designation – National Association of Plan Advisors – 2015
- Plan Financial Consulting, Level 2 Certification – National Association of Plan Advisors – 2015
- Certificate in Action Selling Sales Training – 2014
- Plan Financial Consulting Certification – American Society of Pension Professionals & Actuaries – 2013
- Action Selling Certification Program – Minneapolis, MN – 2011
- Graduate – National Trust School, American Bankers Association – 2003
- Graduate – Leadership West Michigan, Holland, MI – 2003

Education

Central Michigan University

Bachelor of Science in Business Administration, Accounting