

## Institutional Business Development Biographies



### **John C. Yackel**

*Executive Managing Director, Head of Institutional Business Development*

John oversees relationship development activities and leads efforts to help existing institutional client firms grow their business and increase sales.

A 20-plus-year veteran of the industry, John worked at Fortigent LLC before joining Envestnet. At Fortigent, he helped drive business development and develop new relationships with institutions and advisors who serve ultra-high-net-worth clients. He has specific expertise working with banks, trust companies, registered investment advisors, and family offices.

Prior to Fortigent, John spent 15 years at SEI, serving in various leadership roles in sales management, business development, marketing, relationship management, and business strategy. He was instrumental in establishing SEI's Community Bank division, where he developed new outsourcing relationships with some of the country's most progressive banking institutions. Subsequently, he developed strategic outsourcing relationships within SEI's Money Manager division, which provided proprietary accounting, administrative services, compliance, and distribution solutions. He also worked in SEI's Advisor Network group, where he held two senior positions - Midwest advisor business manager and director of sales. In these roles, he was responsible for consulting and recruiting SEI's Elite Select RIA clientele.

John earned a B.A. in economics from Bucknell University and maintains FINRA Series 7 and 63 securities designations, and a Series 65 Investment Advisor registration.



### **Todd Cooper, CIMA**

*Senior Vice President, Institutional Business Development*

Todd develops new client partnerships and manages existing client relationships to deliver comprehensive wealth management platforms.

Todd has more than 20 years of experience in the investment management industry. Before joining Envestnet, he served as a private client investment analyst and institutional relationship manager at Neuberger Berman, where he worked closely with portfolio managers and wealth advisors to service the firm's high-net-worth and institutional clients. He began his career as an accountant at Ernst & Young LLC, where he managed audit engagements for major Wall Street investment firms.

Todd earned a B.A. in accounting from the University of Massachusetts Amherst, in 1992. He maintains FINRA Series 7 and 63 securities designations, and is a Certified Investment Management Analyst (CIMA®) and a Certified Public Accountant (CPA). He also is a member of the Investment Management Consultants Association (IMCA) and serves on IMCA's Audio Broadcast Education Committee.

**John Phoenix**

*Managing Director, National Sales Manager Advisory Services*

John is the National Sales Manager for the Institutional Business Development team at Envestnet. He is responsible for leading the new business efforts around large enterprise firms looking to deploy the Envestnet suite of services. John supports the firm's efforts in the Bank, Independent Broker Dealer, Regional Broker Dealer and Registered Investment Advisor channels.

Most recently, John lead the High Net Worth Sales division at Envestnet working with RIAs, hybrid RIAs and Independent Advisor Networks that deployed Envestnet. John was CEO and Founder of Metamorphosis Money Management an RIA in Denver, Colorado specializing in tax transition/overlay and back office outsourcing for RIAs from 2005 through 2010 a company that he eventually sold to Envestnet. Prior to M3, John worked for 6 years as a Managing Director for Alexander Capital Management Group, where he was head of sales and marketing. Prior to that, John was a Regional Director for Putnam Investments where he led the sales and marketing efforts for the state of Florida. John also served as a Regional Director for Kemper Financial Services in Atlanta, Georgia.

John earned his undergraduate degree in History from Washington and Lee University and holds a FINRA Series 65 security license.

**Dan Jones**

*AVP, Institutional Business Development*

Mr. Jones serves as an AVP of Business Development for Envestnet. Within this role at Envestnet, he supports the firm's Institutional sales initiatives. In particular, Mr. Jones focuses the majority of his efforts on prospecting new institutional clients (Banks, Broker/Dealers, Trust Companies & large RIA's) as well as providing support and advice to current clients.

Before his current role, Dan worked as an Internal Regional Consultant and an Associate Regional Consultant at Envestnet. Prior to being acquired by Envestnet in 2010, he worked in Sales as well as an Analyst for Prima Capital. Before joining Prima Capital he was employed as a Senior Operations Analyst with Clayton Fixed Income Services in Denver, Colorado where he was responsible for providing reporting and analysis on a number of agency-issued Mortgage Backed Securities.

Mr. Jones received his Bachelor's Degree in Economics from Southern Illinois University with a minor in Speech Communication. Additionally, he holds a Series 65 Investment Advisor registration.



**Tara Walsh, CFP®**

*AVP, Institutional Business Development*

Tara is AVP of Institutional Business Development for Envestnet. Tara works to develop new client partnerships and support existing client relationships to deliver comprehensive wealth management technology.

Before joining Envestnet, Tara worked in the Portfolio Management Group at Hirtle Callaghan, working directly with High Net Worth clients and institutions to provide investment management and financial planning. Tara began her career with the Vanguard Group in Malvern, PA, working in their High Net Worth Flagship Division as an Assigned Representative, covering her own book of clients while providing advice and guidance on Vanguard funds and products.

Tara earned her Bachelors of Science Degree in Business Administration, double majoring in Finance and Economics. Tara is also a registered Certified Financial Planner™ and holds a Series 65 Investment Advisor registration.