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Top Skills

Retirement Planning
Sales Management
Financial Services

Certifications

AIFA®
AIF®

Matt Donaghue, AIFA®

Vice President Practice Development, Foresters Financial Services
San Antonio, Texas

Summary

Experienced financial services professional with a demonstrated history of working with financial advisors and life insurance agents to grow and strengthen their practices. Skilled in Qualified Retirement Plans, Asset Management, Retirement Income Planning, College Planning, Life Insurance Planning, Sales, Communication, and Practice Management.

Experience

Foresters Financial Services
Vice President, Practice Development
August 2015 - Present
New York, New York

I am responsible for two departments. The first is Retirement Plans, which is responsible for generating business development opportunities for Advisors to work with plan sponsors in the 403(b), 457, and 401(k) markets. The second is Practice Development., which is responsible for creating, deploying and administering an Advisor-centric practice development program. Deployed new contact management system, digital business processing system, practice management system, and Advisor teaming program. Stood up an Advisor training department designed to support the learning and development needs of Financial Advisors. Implemented and strengthened strategic alliances with industry firms and organizations, including NTSA, fi360, LIMRA, the American College, GAMA, MDRT, Horseshmouth, and Pietech.

Prudential Financial
Regional Sales Vice President
August 2014 - August 2015 (1 year 1 month)
San Antonio, Texas Area

Served as point-of-sale insurance consultant in south Texas. Worked with six financial services firms, ranging from banks to independent broker dealers. Increased submitted annualized premium from \$138,000 in the rolling 12 months prior to working in the territory to an average of \$115,000 per month in just over one year.

Foresters Financial Services

8 years 2 months

Vice President, Business Development

July 2012 - August 2014 (2 years 2 months)

New York, NY

Served as external wholesaler for a sales complex in a subsidiary organization. Concentrated on retirement planning concepts including Social Security Planning, Retirement Income Planning and Life Insurance Planning. Helped increase overall sales within the complex by over 35% in first year and over 25% in second year.

National Training Manager

July 2009 - July 2012 (3 years 1 month)

Toronto, Canada Area

Established training program for life insurance agents in support of Foresters' Independent Marketing Organization (IMO) distribution. Over 15,000 agents participated in training over the course of 2 years. Trainees saw significant increases in submitted premium, number of applications submitted and policies issued.

Sales Desk Supervisor

August 2007 - July 2009 (2 years)

Greater Minneapolis-St. Paul Area

Supervised a sales desk that provided sales support to over 38,000 independent life insurance agents.

Internal Wholesaler

July 2006 - August 2007 (1 year 2 months)

Greater Minneapolis-St. Paul Area

Served as an internal wholesaler supporting a field force of over 38,000 independent life insurance agents.

Education

Norwich University

Master of Arts - (M.A.), Military History · (2018 - 2020)

Hamline University

Bachelor of Arts (B.A.), History · (1999)