ROBERT T. LANCASTER

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SALES/MARKETING MANAGEMENT FINANCIAL SERVICES

Seasoned producer with eight years experience working with institutional markets and corporate clientele. Consistently ranked at the top in financial services sales at national organizations. Energetic, achievement oriented self-starter, and strategic planner. Skilled at generating and converting prospects into clients. Able to readily translate client's objectives into a successful financial portfolio. Confident public speaker conducting client presentations and seminars.

Strong Book of Existing Clients and Intermediaries
Develop/Manage Strategic Partnerships and Networks to Launch New Products. Successful record in building existing client related institutional funds.

Product expertise includes indexed based and leveraged sector mutual funds, retirement plan services, other investments, Internet fund trading, cross selling of bank products and services, and distribution of loan portfolios.

PROFESSIONAL SALES EXPERIENCE

Regional Coordinator 2000 – Present
Profund Advisors LLC, Bethesda, MD

- Assist National Vice President with business development with potential institutional clientele. Establish strategic selling alliances. Build client relationship through high quality personalized service. Educate clients and provide updates of accounts. Develop new products. Prospect, qualify and develop new relationships.
- Increased account assets from 95 to 230 million while working for ProFund.
- Proactive in the sale of privately managed accounts that maintain over 500 million in assets.
- Supervise two institutional client representatives. Conduct presentations and client seminars. Establish and maintain rapport while promoting 52 ProFunds products and services. Cover Mid Atlantic and Northeast area.
- Client base is comprised of institutional clients, independent registered investment advisors, mutual fund platforms, hedge funds and insurance companies.

Lead Financial Consultant and Bank Officer
Sandy Spring National Bank of Maryland, Chevy Chase, MD 2000

- Provided investment portfolio consultation. Sold bank products and services and distribution of loan portfolios.
- Retail client base was made up of non-profit organizations and small businesses. Managed bank sales personnel and established sales strategies for implemented bank investment programs.

Financial Consultant and Investment Advisor
Citizens Bank/Citizens Financial Securities Incorporated, Providence, RI 1996 - 1999

- Doubled assets and sales revenue in every territory assigned.

- Supervised team of six registered representatives concerning meeting sales goals, licensing, product knowledge, customer relationships, cross selling, and client retention.
- Conducted portfolio consultation and planning with potential and established bank clients focusing on risk management, investment objectives and time horizons.

Securities Trader
Brown and Company Securities, Boston, MA 1995 - 1996

- Traded accounts for institutional and retail investment advisors.
- Assisted Brown & Company with timely transactions regarding equities, fixed income and option securities.

Mutual Fund Specialist
Boston Institutional Group/Funds Distributor Incorporated, Boston, MA 1994 - 1995

- Arranged for the distribution of the Boston Company, Mellon Bank, Munder, Glenmede, and Harris mutual funds to potential investors and advisors. Helped clients develop proper investment allocation.
- Knowledgeable about portfolio managers' investment objectives, philosophies and strategies. 1994 - 1995

Broker Assistant
Smith Barney/Shearson Lehman Brothers, Boston, MA 1992 - 1994

- Conducted research concerning with potential investors and their investment needs resulting in the establishment of good relationships.
- Maintained contact with existing clientele and updated portfolios according to changing investment objectives.

EDUCATION

MA, NorthEastern University, Boston
B.S. Business Administration
NASD Series 7, 63, 24 & 65

Registered Representative Life and Health Services.
Frequently participated in sales representative training and investment seminars for potential clients. Educate clients about products and services at investment fairs, business seminars and educational nights.

AWARDS

- **Putnam Golden Scales Council,** earned 3 million in Assets for the year 2 years
- **Fidelity Council Investors** 4 years
- **Fidelity Funds at Citizens "98"**