



(512) 784-1066

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EDUCATION

Abilene Christian University

B.B.A in Marketing

2002-2006

PROFESSIONAL SKILLS

- Operations reporting & communication
- Project management
- Marketing & business strategy
- Client relationship engagement
- Creative content creation
- Event coordination
- Team collaboration

CERTIFICATIONS

Financial Industry Regulatory Authority (FINRA)

Series 7

Series 66

Series 31

Series 9

Series 10

The American College

Certified Financial Planning Pre-Certification

REFERENCES

AVAILABLE UPON REQUEST

Sheena C. Busch

Founder & Creator
Sheena Carol Productions

EXPERIENCE

Director of Marketing

Americana Partners | Austin, Texas | June 2019 to March 2022

- Director of Marketing and Client Engagement for Americana Partners, managing \$4.5 billion in family and institutional client assets
- Coordinates firm-wide, advisory board, and investment product manager events Manages all mass distributed client and prospect communication of firm market commentary, announcements, and events
- Oversees firm website and social media accounts, (Facebook, Twitter, and LinkedIn)
- Creates local marketing collateral and stationary, and collaborates with partner firms' marketing teams for specific project management

Central Regional Analyst

Morgan Stanley | Dallas, Texas | May 2017 to May 2019

- Managed sales, performance, and operational metrics for Morgan Stanley's Central Region, consisting of approximately 3,000 client advisors and service staff managing over \$30 billion assets across 14 states
- Created and implemented new design, content, and timeline strategy of daily regional internal communication, which was ultimately adopted across other Morgan Stanley regions across the nation
- Co-coordinated all regional hosted events and training for Financial Advisors, Complex and Branch Management, and Client Service Associates
- Project managed internal and external company-wide initiatives for the Central Region, including top advisor nominations, events, and sponsorships for Forbes, Barron's, The Financial Times, and The Players PGA Championship

Branch Manager Assistant

Morgan Stanley | Austin, Texas | September 2014 to May 2017

- Oversaw daily branch operations for 71 employees with \$3.9 billion assets under management
- Project managed branch initiatives, such as IT support, branch remodel, service projects, employee onboarding, building management communication, and corporate communication
- Coordinated branch events and entertainment content production

Registered Marketing Associate & Financial Advisor

Morgan Stanley & UBS Wealth Management | Austin, Texas | May 2008 to September 2014

- Co-Founder of The Busch Group financial advisory team managing approximately \$300 million in client assets
- Managed key client relationships in coordination with their individual legal, insurance, and tax planning teams
- Performed client meetings and ongoing investment portfolio reviews Assisted in development and implementation of client financial planning and overall investment portfolio methodology

Sales & Marketing Associate

Homecare Homebase & Encompass | Dallas, Texas | July 2006 to May 2008

- Project managed ongoing company home health technology tradeshow schedule, sales representative travel, and booth coordination
- Co-coordinated Encompass Home Health sales meetings, Homecare Homebase software user conferences
- Assisted in marketing campaign coordination and ongoing content creation