Corey Weiss, CLU

Sherman Oaks, CA
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Authorized to work in the US for any employer

WORK EXPERIENCE

Business Development Officer

Super G Funding, LLC - Newport Beach, CA - July 2015 to November 2015

Internal Wholesaler, Operations Analyst

Reliant Life Shares, LLC - Sherman Oaks, CA - June 2013 to August 2014

Responsibilities

• Recruited, trained, and supported sales force of 216 financial advisors
• Instrumental in doubling company sales volume in less than 12 months
• Revamped existing sales and recruiting systems
• Leveraged relationships to serve key market segments and distribution channels
• Comprehensive seminar initiative generated $3.2 million of additional revenue
• Created programs to motivate advisors and improve investor relations
• Chiefly responsible for global marketing strategy and direction
• Conceived and wrote all content including articles, industry white paper, and monthly advisor newsletters
• Complete website overhaul yielded a 900% increase in incoming leads
• Evaluated internal processes; found and fixed operational inefficiencies
• Partnered with third-party vendors to foster synergistic, win-win relationships

Founder

Life Capital Exchange, Inc. - Los Angeles, CA - May 2005 to June 2013

Responsibilities

• Helped seniors obtain maximum market value for their life insurance policies
• Consummated life settlement transactions on behalf of 31 professionals and 14 personal clients
• Directed the entire life settlement process; packaged and managed cases, negotiated offers, and facilitated timely and efficient closings
• Established and cultivated working relationships with 42 institutional buyers
• Built system to engage and retain financial advisors
• Trained and supported advisors; conveyed techniques to market and cross-sell
• Broadened product line; armed advisors with complementary planning tools
• Formed strategic alliances to access investment-grade inventory
• Direct-marketing campaign generated 6 new clients and an ROI of 309%
• Top aggregator in Southern California with 49 applications for annuity-arbitrage program
• Consultant to longevity-derivatives hedge fund
• Regular contributor to industry trade journals on life market developments and strategies
• Served on Board of Directors for NAIFA, the National Association of Insurance & Financial Advisors, Los Angeles chapter

Trading & Market Structure Consultant

UNX, Inc. - Burbank, CA - May 2004 to January 2005

Responsibilities

• Evaluated client systems to reduce transaction costs and improve portfolio performance
• Created and launched a broad initiative to introduce platform to hedge funds
• Collaborated with development team to expand existing software
• Resolved time-sensitive trading issues between customers and exchanges
• Taught buy-side traders how to capitalize on changing market structure and rules

Equities Trader

Broadway Trading - New York, NY - January 1998 to March 2004

Responsibilities

• Built up retail trading account through strict self-discipline and objectivity
• Recruited, mentored, and supervised team of traders; monitored and controlled trading desk risk and exposure
• Analyzed real-time data for precise decision making in a volatile, high-pressure environment
• Identified favorable risk/reward opportunities using advanced charting and behavioral finance techniques
• Researched daily market activity to profit from timely ideas and observations
• Devised and employed methods to properly hedge winning positions
• Chosen to star in 3 television commercials for TD Ameritrade's Strategy Desk trading platform

Financial Advisor

John Hancock Financial Services, Inc. - East Meadow, NY - June 1993 to December 1997

Responsibilities

• Built 242-client financial planning practice through cold calling, referrals, and repeat business
• Sold and supported more than $82 million of life and long-term care coverage
• Counseled clients to help them achieve their financial goals
• Qualified for performance-based rewards by consistently placing in top 10% of national sales force
• Conceived and implemented novel approaches to generate new business
• Created seminar-selling system; conducted seminars to pique interest and secure appointments
• Led 27-agent office in long-term care insurance sales; increased LTC production by an average of 44% annually
• Hired, developed, and managed productive telemarketing staff
• Interviewed for featured piece in The Wall Street Journal

EDUCATION

Chartered Life Underwriter (CLU)

The American College - Bryn Mawr, PA
2014 to 2014

BBA in Accounting, Honors

University of Massachusetts - Amherst, MA
1989 to 1993

CERTIFICATIONS

Certifications:

Microsoft Certified Systems Engineer (MSCE)
CompTIA A+
Learning International's Professional Selling Skills Program
Dale Carnegie Sales Advantage Course
The Tao of Persuasion Course

PUBLICATIONS

Reliant Life Shares White Paper

https://www.dropbox.com/s/idgd3nz9cinv57c/Reliant%20Life%20Shares%20White%20Paper.pdf?dl=0
January 2014

RLS Financial Advisor Newsletter - Q1 2014

https://www.dropbox.com/s/f0643v2y4pikt0m/RLS%20Financial%20Advisor%20Newsletter-Q1%202014.pdf?dl=0
March 2014

"California Couple Sues Lincoln National"

http://www.lifehealthpro.com/2014/05/05/california-couple-sues-lincoln-national
National Underwriter, May 2014
LifeHealthPro.com, May 2014

"Institutional Profitability Brought to the Individual Investor"

http://www.lifeinsurancesellingdigital.com/lifeinsuranceselling/december_2013?pg=47#pg47
Life Insurance Selling, December 2013
California Broker, February 2014

"Life Settlement Synthetics: The Next Generation of Traded Longevity"

https://www.dropbox.com/s/p0me9m012ourht1/CalBrokerMag%20Article-December%202008.pdf?dl=0
California Broker, December 2008

ADDITIONAL INFORMATION

Seasoned veteran of the financial industry with a 22-year track record of success

Entrepreneurial drive and vision – built 3 profitable businesses from scratch

Gifted communicator – more than $91 million in cumulative sales, natural motivator and mentor, champion of ideas

Lifelong student of psychology – counterintuitive thinker, systematic approach to business development

Understated leadership style – promotes teamwork by upholding company values and mission