John Dahle

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Overview

Financial industry professional with experience consulting with c-suite and senior executives as an expert on complex financial, legal, regulatory, and human resource issues.

Core Competencies:

- Resourceful and creative problem solver focused on delivering high quality results.
- Analytical and technically gifted; able to understand complex issues and communicate them effectively.
- Driven, independently motivated and dedicated to mutual success for peers and clients.

Work Experience

Newport Group | Chicago, IL
Senior Consultant, 2014-present
Newport Group is a leading provider of retirement plan services and the largest provider of nonqualified and supplemental benefit solutions.

Highlights:

- Led sales team in many successful acquisitions of new clients.
- Development of new finalist presentations and revised annual plan review.

Primary Responsibilities:

- Develop strategy for new client engagements.
- Drive sales process in partnership with client advisors and Regional Directors.
- Coordinate team effort to win new business through RFP and direct referrals.
- Consult with senior client management and intermediary partners in designing contemporary nonqualified benefit solutions.
- Develop and maintain key client relationships with decision-making executives, support staff, and outside advisors.
- Consult with existing and prospective clients and their advisors regarding plan design, financing, and participant communication strategies.
- Act as subject matter expert for nonqualified plan design best practices, legal and regulatory standards, and plan funding techniques.

Prudential Financial | Deerfield, IL
Vice President, 2009-2014, Senior Director, 2007-2009
Prudential Retirement – a division of Prudential Financial – is a leading provider of retirement benefit solutions. MullinTBG was a division of Prudential Retirement focused on nonqualified and supplemental benefit solutions.

Highlights:

- Manage client relationships for nearly 30 client accounts and annual revenue of more than $4,000,000.
- Consistent history of client retention, increasing client revenue, and pursuing additional sales opportunities.

Primary Responsibilities:

- Maintain key client relationships with decision-making executives, support staff, and outside advisors.
- Manage plan service needs including enrollment, record-keeping, funding strategies, corporate reporting and participant communications.
- Draft client reports with support from plan administrators and analytical staff.
- Coordinate client service efforts of administrative teams and supporting technical resources.
- Maintain high level of client satisfaction, client retention, and profitability.

Independent Consultant
Consultant, 2005-2006
Worked with former firm and outside advisors to transition company structure and adapt systems to new regulations.

Highlights:
- Managed technical research on emerging tax, legal, disclosure, and financial regulations related to nonqualified benefit programs.
- Authored documentation for internal and client distribution.
- Managed database development and migration of mission-critical database systems from Oracle to MS-SQL.
- Supervised development of recruitment and training programs for technical staff.
- Developed specification documents for application development.
- Integrated new regulations and business rules into proprietary nonqualified plan administration system.

The Giles Organization | Bannockburn, IL
Partner, 1995-2005
The Giles Organization is now the Executive Compensation and Benefit Strategies division of Mesirow Financial.

Highlights:
- Founding partner of an executive compensation and benefits consulting firm.
- Success in building an enterprise serving mid-sized public and private companies.
- Designed, developed, and maintained proprietary recordkeeping applications, and databases as well as participant and plan sponsor websites.

Primary Responsibilities:
- Consult with senior client management as primary technical resource regarding benefit plan and funding issues.
- Support client development and manage ongoing client relationships.
- Lead research and development initiatives in tax, legal, financial, and plan design issues.
- Mentor and train staff regarding tax, legal, financial, accounting, and plan design topics.
- Develop plan design models and processes for evaluating financial impact to cash flow, earnings, and balance sheet.
- Lead authoring and production of client reports during all phases of plan life cycle.
- Cultivate and maintain relationships with external legal, finance, and financial product vendors.

Management Compensation Group – Chicago | Deerfield, IL
Senior Analyst, 1991-1995, Intern, 1990-1991
Management Compensation Group was a national executive benefits consulting practice with 12 independently owned offices.

Primary Responsibilities:
- Develop plan design models and analytical tools.
- Support technical services, collaborating on numerous research projects.
- Assist lead consultants and draft client reports.
- Participate in meetings with senior client management in a supporting role.

Education

Universidad de la Sabana | 2007 | Bogotá, Colombia
Completed immersive Spanish language course through Nueva Lengua. Successfully matriculated to intermediate level study.

Northwestern University | 1987-1991 | Evanston, IL
B.A. Economics, 1991
In addition to major coursework, pursued a heavy concentration in mathematics and statistics including multivariate calculus, econometrics, probability and statistics, differential equations and linear algebra.

The Valley School | 1983-1987 | Grand Blanc, MI
Graduated 1987 from a private, independent college preparatory school

Skills, Licenses and Certifications

- Administrator and user experience with desktop and server operating systems.
- Experience with modern web technologies, object oriented programming, and developer tools:

JavaScript	JQuery	Node.js
Bootstrap	Materialize	git
Firebase	HTML 5.0	CSS

- Developer experience with enterprise-class databases.
- Experience with general office application software.
- FINRA Series 6, 63, and 65.
- Producer licenses for Accident and Health, Life Insurance, Variable Life and Annuities (numerous states).
- Conversant in Spanish.