

HEIDI M. PEDERSON

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SUMMARY

- Creative, dynamic, innovative professional with strategic planning, relationship building, operations, marketing, communications, and leadership talents
- Strong ability to engage in big picture analysis, connect ideas and people, and solve complex problems
- Proven track record of building exceptional relationships with clients, team members, partners, and service providers
- Successfully creates new ventures: marketing programs, strategic alliances, operations platforms, policy implementation, services, and product platforms
- Experience spans a wide array of business critical functions including strategic planning, client relationship management, business development, marketing, communications, culture development and integration, team and budget management, corporate governance, regulatory compliance, operations, policy development and implementation, and business writing and presenting.

PROFESSIONAL EXPERIENCE

HeartPath Coaching LLC 2012 – present
Founder, Life and Executive Coach, Consultant

Chaffee & Associates LLC, Minnetonka, Minnesota 2010 – 2012
Vice President

- Responsible for strategic marketing plans, including business development, service enhancement, knowledge resources, differentiation, branding, and corporate image
- Developed business opportunities in targeted markets, including client acquisition, strategic partnerships, alliances, and provider relationships
- Managed private family relationships, family office services offering and asset management platform

Executive Compensation Solutions, Covina, California/Victoria, Minnesota 2008 – 2009
President and Chief Marketing Officer

- Responsible for strategic direction and initiatives for national footprint, marketing, sales management, and operations
- Created innovative approaches to client relationships, services, knowledge resources, business lines, differentiation, branding, and corporate image
- Developed and managed strategic partnerships, alliances, and product provider relationships

Octavus Group, LLC, Excelsior, Minnesota 2007 – 2008
Senior Vice President

- Led and implemented strategic direction and initiatives for marketing, operations, and technology
- Managed broker/dealer, including operations, systems, supervision, and compliance
- Enhanced operational and marketing relationships with product partners

M Financial Group, Portland, Oregon 1998-2007
President, M Holdings Securities, Inc. 2003 – 2007

- Responsible for strategic direction and management of federally registered broker/dealer and registered investment advisor, including client relationships, legal and regulatory relationships, staff, budget, products, business services, marketing, operations, systems, supervision, and compliance
- Maximized efficiencies and profitability through technology initiatives and enhanced service models
- Built strong ties with clients and strategic partners through relationship management, marketing services, communication initiatives, and business management

M Financial Group, Portland, Oregon**Director, Marketing**

1998 – 2003

- Developed and implemented strategic marketing initiatives to enhance organizational perception, brand, capabilities, deliverables, and communications
- Consulted with members on business development issues, strategic partnerships, joint ventures, and succession planning
- Managed corporate governance processes, including the creation and oversight of policies and procedures, corporate agreements, and resolution of issues

Standard Insurance Company, Portland, Oregon**Director, Marketing**

1995 – 1998

- Managed staff, budget, marketing strategies, conference and event planning, advertising, promotional materials and campaigns, recognition programs, and activities of Marketing and Advanced Sales departments (life insurance, disability income insurance, and annuity products)

Advanced Sales Attorney

1994 – 1995

- Consulted with and trained agents on estate, charitable, and business planning and tax law related to insurance planning

Lutheran Brotherhood (now Thrivent Financial), Minneapolis, Minnesota**Charitable Marketing Specialist**

1991 – 1993

- Responsible for charitable marketing (advanced marketing department), educated national field force on charitable planning techniques and tax implications, developed marketing and sales tools to promote charitable planning

EDUCATION**William Mitchell College of Law, St. Paul, Minnesota**

Juris Doctor, 1992

St. Olaf College, Northfield, Minnesota

Bachelor of Arts, Political Science and Religion, 1989

Centre for Medieval and Renaissance Studies, Keble College, Oxford University

Michaelmas term, 1988

The Coaches Training Institute, San Rafael, California

Co-Active Coach, 2012

The American College, Bryn Mawr, Pennsylvania

Chartered Life Underwriter (CLU), 1997

Financial Industry Regulatory Authority (FINRA) Series 7, 24, 27, 31 and 63 licensed

Life and health insurance licensed

PROFESSIONAL ORGANIZATIONS AND COMMITTEES

Strategic Coach Program, participant, 2011-2012

Minnesota State Bar, member (currently inactive), 1992-present

Oregon State Bar, member, 1993-2007

Association for Advanced Life Underwriting, member, 1999-2009

Society of Financial Services Professionals, member, 1997-2009

Young Presidents' Organization (YPO), Oregon Evergreen Chapter, 2006- 2007

American Council of Life Insurance (ACLI), Securities Regulation Committee, 2005-2007