



Mary Kate Gulick

WEALTH MARKETING
& BRAND LEADER

HIGHLIGHTS

- Led Agile transformation
- Led top-of-funnel D2C lead gen engine build for Carson
- Set records for B2B lead generation, reducing CPL from \$1,800+ to \$126
- Led multi-million dollar financial advisor events
- Effectively led team of 40 through multiple organizational changes
- Established 2 award-winning, data-driven content marketing programs geared toward financial advisors
- Increased team productivity
- Boosted brand consideration
- Built high-performance culture
- Set new digital engagement and media coverage records

EXPERTISE

- Financial advisor marketing
- B2B marketing in financial services
- Human-first marketing org leadership
- Event leadership
- Agile marketing
- Public speaking
- Brand strategy & management
- Content marketing programs
- Lead generation
- Creative & content strategy
- Digital marketing management
- In-house agency leadership
- Sales/marketing alignment

CONTACT

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WORK EXPERIENCE

FICOMM PARTNERS

CMO, EVP Marketing & PR Services | July 2023-Present

- Oversaw marketing and PR strategy for retained client accounts, including organic growth programs for RIAs and B2B efforts targeted toward independent advisory firms
- Restructured public relations function to achieve better client results and more integrated working model
- Revamped Ficomm's own marketing and content ecosystem to drive increase digital exposure
- Launched Ficomm's original proprietary research products, driving critical media exposure for the brand
- Spearheaded well-received company rebrand

CARSON GROUP

Chief Marketing Officer/SVP Advisor Marketing & Sales Enablement | June 2021-June 2023

- Restructured struggling marketing team and raised eNPS from 20 to 65 over the course of one year
- Overhauled advisor marketing service model to create record-setting NPS score from advisors
- Rolled out new unified brand messaging that speaks to both B2B and B2C audiences
- Established the organization's first-ever nationwide D2C marketing and lead generation program
- Oversaw management of Excel and Partner Summit, Carson's annual events.
- Revamped B2B lead gen efforts to triple MQLs in the program's first quarter and established first sales enablement function
- Led the women's initiative including original research and the industry's premier event for women.
- Oversaw events portfolio overhaul to turn it into a cost-efficient channel for deep funnel recruitment
- Spearheaded the creation of the organization's first full-funnel analytics tracking for B2B marketing
- Became mainstay on the industry conference circuit, speaking on marketing, organic growth, and women in wealth management

EDUCATION

MA | Advertising, Marketing & Communication Studies

University of Nebraska-Lincoln

BA | Mass Communications

Illinois State University

AWARDS & CERTIFICATIONS

- AI Prompt Certification through the University of Nebraska-Lincoln (2024)
- Finalist for Wealth Management Innovator of the Year (2023)
- Wealth Management CMO of the Year (2022)
- Amazon #1 Bestselling author
- AMA Omaha Marketer of the Year (2022)
- AMA Professional Certified Content Marketer (PCM)
- ICAgile Certified Agile Marketing Professional
- Adobe Digital Masters Certified
- SEMRush Keyword Research Certification
- Hubspot Inbound Certification
- 2018 President AMA Lincoln (National Bronze Chapter of the Year)
- AMA Lincoln Prism Awards
- AMA Omaha Pinnacle Awards
- AAF Nebraska Addys
- Lincoln Journal Star 20 Under 40
- Graduate of Leadership Lincoln

WORK EXPERIENCE (CONTINUED)

TD AMERITRADE INSTITUTIONAL (B2B)

Director, Digital & Content Marketing/Senior Manager, Brand & Creative | Sept 2017 - Jan 2021

- Drove 2x organic search traffic and 26% increase in lead gen YoY in FY 2019, drove bounce rate down to historic 9% in FY 2020.
- Established organization's first B2B content marketing function generating an award-winning program, including editorial hub, podcast, magazine overhaul and Alexa flash briefing pilots
- Supported TDAI LINC, one of the industry's largest events
- Supported the organization's NextGen and Women in Wealth Management initiatives
- Established first-ever B2B quick-turn creative team
- Saved \$376k in creative agency expenses in first year
- Developed new brand position, messaging and creative that outperformed previous agency-created campaign by 2x
- Implemented organization's first Agile marketing team, maximizing the speed and quality of creative work
- Spearheaded first market-response opportunities, turning real-time creative within 48 hours

IBM (B2B)

Creative Director/Marketing Ops Manager | Feb 2016 - Sep 2017

Recruited to maximize efficiency and improve creative product of Employment Branding team

- Led global marketing function for IBM Talent Acquisition Optimization (team of 6)
- Developed and implemented marketing strategy for business unit, including department's first-ever content marketing program, focused on thought leadership and B2B lead generation
- Oversaw Employment Branding division, including design, content and web development work created for global clients (team of 12)
- Implemented and led Agile work environment

NEBRASKA CHILDREN & FAMILIES FOUNDATION

VP Marketing Strategy | Feb 2013 - Feb 2016

Built out strategic marketing function to streamline fundraising and increase awareness

ERVIN & SMITH ADVERTISING AND PUBLIC RELATIONS

Senior Account Planner | Apr 2012 - Feb 2013

Associate Creative Director | Sep 2008 - Apr 2012

Copywriter/Sr Copywriter/Assoc CD | Aug 2001-July 2006

SNITILY CARR ADVERTISING (NOW FIRESPRING)

Copywriter | July 2006 - Sep 2008

Delivered creative marketing solutions for B2B and B2C clients