

Account Executive

Stacee Jacobs

Fort Lauderdale, FL

staceejacobs@gmail.com

(954) 995-1555

PROFESSIONAL SUMMARY

Dynamic and results-driven Account Executive with 20+ years of experience in sales leadership, business development, and client relationship management across diverse industries. Proven ability to exceed revenue goals, optimize operational strategies, and deliver client-focused solutions. Demonstrated success in team leadership, talent development, and strategic planning. Adept at identifying market opportunities, executing high-impact sales initiatives, and driving sustained business growth. Passionate about building trusted client relationships and exceeding expectations.

CORE COMPETENCIES

- B2B & B2C Sales Strategy
- Client Relationship Management
- Revenue Growth & Forecasting
- Market Expansion & Analysis
- Operational Optimization
- Contract Negotiation
- CRM & Billing System Management
- Talent Acquisition & Team Leadership
- Strategic Business Development

PROFESSIONAL EXPERIENCE

SELF-EMPLOYED | BUSINESS CONSULTANT — DAVIE, FL

March 2023 – Present

- Designed and implemented business growth strategies, resulting in a 75% revenue increase.
- Streamlined billing operations, reducing AR balances by 70% through digital system integration.
- Managed executive scheduling and operational logistics for business owners and teams.
- Consulted clients on process improvements, workflow design, and financial systems.

INITIATE IMPACT | CO-FOUNDER — MIAMI, FL

March 2021 – February 2024

- Spearheaded sales, marketing, and operations for a startup consultancy with 100% client retention.
- Built strategic client partnerships through targeted outreach and personalized planning services.
- Conducted competitive market research to identify growth opportunities and trends.
- Developed brand materials and managed customer experience, increasing engagement and loyalty.

THRIVENT FINANCIAL | LEAD FINANCIAL PLANNER — DAVIE, FL

July 2008 – February 2020

- Managed a successful financial planning practice with over 350 active client households.
- Achieved consistent revenue growth through comprehensive financial advisory services and strategic marketing initiatives.
- Recruited, trained, and led a high-performing team to support operational excellence and client satisfaction.
- Delivered tailored financial solutions, contributing to high referral and retention rates.

HANKS AUTO BODY | SHOP MANAGER — WHEAT RIDGE, CO

August 1999 – September 2007

- Drove significant sales and service improvements, increasing customer satisfaction and loyalty.
- Optimized vendor relationships and supply chain processes to improve efficiency.
- Built and mentored a collaborative, customer-focused team, enhancing service delivery.

CERTIFICATIONS

- Certified Private Wealth Advisor (CPWA) – Investment Wealth Institute
- Behavioral Financial Advisor (BFA) – Think2Perform
- Retirement Management Advisor (RMA) – Investment Wealth Institute

EDUCATION

Laramie County Community College – Laramie, WY

Criminal Justice and Corrections

Stacee Jacobs
Fort Lauderdale, FL
staceejacobs@gmail.com
(954) 995-1555

June 17, 2025

Dennise Diaz

RD Global

3303 W Commercial BLVD, Suite 150

Fort Lauderdale, FL 33309

Dear Dennise

Thank you for taking time out to speak with me today about the sales account manager position with RD Global (Agenzee). With over 20 years of experience in sales, business strategy, and client relationship management, I bring a proven track record of driving revenue growth, cultivating loyal client bases, and delivering tailored business solutions that meet and exceed expectations.

In my previous roles—including Co-Founder of Initiate Impact and Lead Financial Planner at Thrivent Financial—I successfully led strategic initiatives that resulted in increased market share, long-term client retention, and operational efficiency. I recently developed a growth strategy for a consulting client that boosted their revenue by 75% while reducing accounts receivable by 70%, underscoring my ability to deliver measurable results.

What sets me apart is my holistic approach to sales and client success. I pair deep industry insights with an understanding of behavioral finance to connect authentically with clients and identify solutions that align with both their goals and your business objectives. I thrive in fast-paced environments, enjoy solving challenges collaboratively, and am passionate about contributing to a company's growth trajectory.

I am excited about the opportunity to bring my experience and enthusiasm to the Sales Account Manager role at RD Global (Agenzee). I would welcome the chance to further discuss how my skills align with your goals and how I can contribute to your team.

Thank you for considering my application. I look forward to the opportunity to speak with you.

Warm regards,

Stacee Jacobs