

# DONALD G. TYLER

4480 North Maryland Avenue  
Shorewood, Wisconsin 53211

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## Summary of Experience

Senior Executive with more than 25 years of progressive experience in organizational leadership, marketing and distribution strategies, and administration in the financial services industry. Skilled in P&L management, new business, product development, strategic planning, and marketing communications.

2010 **Milwaukee Symphony Orchestra (MSO)**, Milwaukee, Wisconsin  
Wisconsin's largest arts organization, with 35 staff and 88 full time musicians.

**Interim President & Executive Director**: Reporting to the Chairman, responsible for the overall leadership, direction and management of the MSO. Worked closely with the Board, Music Director, and staff to continue the implementation of the strategic business plan during a 10 month period. Led Board and committee meetings.

- Managed day-to-day business operations, developed effective and measurable goals, and business and financial performance metrics.
- Oversaw all personnel activities for staff and musicians, including hiring, development, retention, and implementation.
- Worked closely with the Chief Financial Officer to manage all activities related to cash flow, annual budgets, and revenue projections.
- Actively participated in the development and stewardship of major donors including individuals, corporations, institutions, and foundations.
- Built effective relationships with business leaders, influential members of the community, media, other arts groups, vendors, and banks to positively influence and represent the presence and brand of the MSO.

2003 to 2010 **Northwestern Mutual**, Milwaukee, Wisconsin  
A \$155 billion financial services firm providing clients with insurance, annuities, investment products, and advisory services.

**Vice President, Investment Products and Services**: As a business line leader, led a team of 75 associates in product development, marketing, sales, and training. Worked across organizational functions to effect major change in strategic direction of the firm, integrating all product lines.

### **Product Research, Development, Pricing & Management:**

- Spearheaded the broker-dealer and advisory platform development for firm's emerging investment services business line, including product research, pricing, and compensation. **Result**: Revamped broker-dealer platform, establishing policies on product rollout, access, pricing and compensation; seamlessly transferred \$8 billion in assets from brokerage to advisory within a regulatory constrained environment.
- Directed strategic relationships for broker-dealer and advisory platforms and other core support relationships with outside firms. **Result**: Leveraging these relationships, was able to efficiently revamp its' platforms and grow revenue to become the fifth largest independent broker-dealer firm in the country, generating over \$400,000,000 in annual revenue.

**Business Development, Sales, Marketing, Training & Communications:**

- Led a division that developed and expanded upon the industry-leading Investment Specialist program serving the needs of 90 branch offices with 6,000 Financial Representatives. **Result:** Grew number of Investment Specialists to over 250, doubling during tenure, resulting in a 30% CAGR in production.
- Designed, built, and implemented a business development and sales support organization to meet the needs of Financial Representatives. **Result:** Effectively transitioned "insurance agents" to Financial Representatives, fulfilling the financial security needs of clients.
- Managed a team that developed brokerage and advisory platforms training curriculum for Financial Representatives delivered through web-based learning, onsite, regional and national conferences. **Result:** Financial Representatives regarded as one of the best trained sales forces; Director of Training recruited to head up corporate training, integrating program in corporate training area.
- Oversaw development of all marketing and communications to field and clients for investment products and services. **Result:** Rebranded all brokerage services from Robert W. Baird to Northwestern Mutual.

**Executive Officer:** Responsibilities included department-level budget responsibilities, an active role in the re-articulation of the firm's corporate strategy, day-to-day corporate level responsibilities through engagement on various corporate committees, including Compliance Best Practices, Business Integration, Investment Products & Services/Agencies, and IPS Field Committee. Served as Trustee for firm's retirement plans. **Result:** Engaged in the successful and implementation of the firm's financial security strategy; one of the key executives responsible for the significant challenge and success of growing revenue and managing expenses of the brokerage and advisory firms to a breakeven point by 2010.

1998 to  
2002

**Precision Marketing Partners & The Academy Of Financial Services Studies,**

Milwaukee, Wisconsin

A \$2 Million privately-held consulting firms serving the financial services industry.

**President and Co-founder:** Responsible for general management of two service firms focused on providing strategic sales and marketing and education/ training services to mid- to large-size financial services firms. Developed and implemented marketing and sales plans for multiple distribution channels and product lines. Accountabilities included P&L, strategic and business planning, budgeting, staffing, new product development, sales, marketing, finance, and operations.

**General Management:**

- Co-founded and developed a comprehensive marketing plan to position firms strategically as a leading provider of sales and marketing consulting services and education/ training.
- Successfully build a significant wholesale distribution and education services client base representing more than 100 financial services firms.
- Directed and managed many of the consulting, operations and financial aspects of the firms; key participant as President and Board Member in all significant management decisions related to management and operations.

- 1995 to 1998 **Wells Capital (Strong Capital Management)**, Milwaukee, Wisconsin  
A privately-held mutual fund company with over \$32 billion in assets under management.
- 1998 **Senior Vice President, Strong Intermediary Services:** Responsible for general management of a \$10 billion, 34-employee division established to service defined contribution, variable insurance products, mutual fund wrap, and supermarket relationships. Accountabilities included P&L, strategic and business planning, staffing, new product development, sales, marketing, finance and operations with a \$16,000,000 budget. Promoted from **Vice President, National Sales Manager** (1995 to 1997).
- Directed strategies which expanded division assets at 60% annualized rate, from \$1.5 to \$10 billion between 1995 and 1998; increased division's percentage of company's net sales from 15% to over 90%; served on industry advisory boards including Fidelity, Schwab, and First Trust.
  - Created unique, growth-oriented sales and marketing strategies, positioning Strong as a recognized leader in advisor, broker-dealer, insurance, bank, and consultant intermediary channels.
- 1994 to 1995 **Thrivent (AAL Capital Management)**, Appleton, Wisconsin  
A \$12 billion mutual fund subsidiary of Aid Association for Lutherans (AAL).
- Vice President of Marketing and Sales:** Responsible for all marketing and sales support activities related to AAL Mutual Funds, Variable Annuities and brokerage unit. Managed staff of 23 and marketing budget of \$3.5 million.
- 1985 to 1994 **American Finance Group (AFG)**, Boston, Massachusetts  
A \$1 billion asset management company offering investments to individuals and institutions.
- Senior Vice President, National Marketing Director**, 1987 to 1993  
**Regional Vice President (Wholesaler)**, 1985 to 1987
- 1983 to 1985 **Angeles Corporation**, Los Angeles, California  
A \$500 million diversified asset management investment company.
- Marketing Manager, Regional Sales Director (Wholesaler)**
- 1977 to 1983 **Campro Systems**, Denver, Colorado  
A \$1 million advertising production company.
- Principal and Co-founder**
- Military:** U.S. Army, Military Police, Specialist IV, 1972-1975
- Education:** **BA, Business/Marketing**, University of St. Thomas, St. Paul, Minnesota, 1977  
**BA, Journalism**, University of St. Thomas, St. Paul, Minnesota, 1977
- Professional Affiliations:** Board Member of Milwaukee Public Museum  
Current Board Member of Repairers of the Breach, a homeless center  
Current Board Member of Eagle Capital Growth Fund  
Former Board, Executive and Finance Committee Member of the MSO  
Former Trustee for Northwestern Mutual's 401(k) and Defined Benefit Plans  
Former Board Trustee, Quintara Funds  
Former President and Board Member, Shorewood Little League

