JULIE M. GEREND

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PROFESSIONAL EXPERIENCE

Wells Fargo Asset Management (WFAM), Minneapolis, Minnesota
Managing Director, Central Region
July 2015 to Present

Responsibilities:

- Principal activities are leading a team to successfully grow,expand and retain assets for WFAM.
- Establish new relationships with institutional investors in the Central Region.
- Large institutional market focus with Public Funds, Corporations, Family Offices and Endowments & Foundations.
- Leverage strong field consultants relationships in this region to develop opportunities and deepen partnerships.
- Expand firm’s presence in Central Region with senior level “C” suite networking and meetings.

Accomplishments:

- Surpassed sales goal for fourth consecutive year with $3.5 million in revenue with a revenue goal of $2.7 million.
- Developed successful three tier prospecting approach to effectively cover all channels.
- Honored in 2016 and 2017 for top Sales Recognition at national conference.
- Effectively managed with senior management support the negative headlines for 100% client retention of new mandates in 2017 and 2018.

Advantus Capital Management, St. Paul, Minnesota
Senior Vice President, Business Development & Client Service
Second Vice President, Securian Corporation

June 2011 to June 2015

Responsibilities:

- Principal activities were servant leadership of the new business development and client service efforts.
- Hired as a change agent to transform the sales and service platform currently in place.
- Developed and expanded new team integrating sales with service.
- Created a sales culture and an environment of accountability and performance.
- Lead and developed sales strategies for a national territory to achieve desired outcomes.
- Established new and expanded relationships with institutional consultants and investors.
- Developed and grew firm’s consultant representation with implementation of new team and strategy.

Accomplishments:

- Surpassed sales goal for three consecutive years with $1.07 billion coupled with 100% Client Retention
- Exceeded sales goal in 2013 with $1.6 billion in total new asset sales against an $815 million goal.
- Exceeded sales goal in 2012 with $915 million in total new assets.
- Executed new cross-sell strategy with 24 new mandates and relationship expansion in 2014.
- Developed new and successful institutional marketing materials including new website launch.
- Successfully selected and implemented new CRM system – Salesforce.com

Blue Rock Advisors, Inc., Wayzata, Minnesota
Director of Marketing
July 2009 to June 2011

Responsibilities:

- Principal activities include marketing and new business development.
- Development of institutional marketing materials.
- Strategic planning with principals & industry market analysis for entire team.
- Lead and developed sales strategies for a national territory.
- Established new relationships with institutional consultants and investors.

Accomplishments:

- Developed new and successful institutional marketing materials.
- Completed ten onsite visits in the first year including both consultants and prospects.
- Implemented new CRM system to track marketing progress as well as develop existing client relationships.
- Developed presentation training for key firm professionals to increase effectiveness and closing ratio.
- Produced better outcomes for new sales as well as cross-sell results.

Peregrine Capital Management, Minneapolis, Minnesota
Senior Vice President & Director of Client Service & Marketing
September 1995 to March 2006

Responsibilities:

- Lead and managed the Client Service & Marketing team. This included the development of national sales and marketing strategies. Implementation of a proactive and innovative client service and marketing program.
- Active leader and member of the Management Policy Group.
- Built, trained and managed a successful Client Service & Marketing team.
- Sales and relationship management to institutional clients, including public entities, financial institutions, insurance companies, foundations, endowments and large corporate clients.
- Lead and developed sales strategies to build a national consultant database and manage relationship development.
- Oversee the development of marketing collateral and client-specific presentation materials for the firm.
- Managed the RFP process and general industry and market related communication efforts.

Accomplishments:

- Successfully managed the majority of the firm's largest institutional client relationships.
- Built an exceptional team with strong hires and effective leadership.
- Team increased the asset base of the firm by $5.4 billion with 63 clients since 1995.
- Team collectively grew firm from less than $3 billion to over $13 billion from 1995 to 2006.
- Individual production was $3.8 billion in assets with 37 clients since 1995.
- Introduced the organization to numerous prospective clients and investment consultants.
- Established an effective cross-selling strategy with strong results and effective collaboration.

In addition to these aforementioned positions earlier career experience included Fidelity Institutional Retirement Services Company, *Wells Fargo/Norwest Corporation – Employee Benefit Services, and M&I Marshall & Ilsley Corporation (acquired by BMO Harris). Also serve as an Adjunct Professor and long term sub at the University of St. Thomas – School of Business – focus was Investments & Finance.*

EDUCATION

University of St. Thomas-St. Paul, Minnesota
Masters of Business Administration

University of Wisconsin-Madison, Wisconsin
Bachelors of Arts-Economics Major

Florence University-Firenze, Italy
Selected Participant, International Study Program

COMMUNITY INVOLVEMENT, ACTIVITIES & INTERESTS

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Volunteer for WCA Foundation, Dorothy Day Center and
The Nativity of Our Lord Catholic Church.
Board Member of Catholic Community Foundation, Chair Investment Committee,
Former Board Member – Catholic Charities and Investment Committee Chair,
Former Board Member - Town & Country Club and Active Mentor, Guest Speaker and
Former Adjunct Professor at the University of St. Thomas,
Former Investment Committee Member of Allina Health Systems
Member of Association for Investment Management Sales Executives, Past President of the Evans Scholar Alumni Association &
Recipient of the Evans Scholarship,
Recipient of Top Women in Finance 2004,
1989 M&I Loaned Executive – United Way,
Basketball Coach for St. Paul Recreation and Visitation School.
Enjoy Travel, Reading, Gardening & Triathlons.