

MATTHIAS MACKAY

815-735-0064 | mackay.matthias@gmail.com

EXPERIENCE

Regional Director of Development (Midwest) National Philanthropic Trust 2022 – Present	<ul style="list-style-type: none">• Collaborate with institutional financial partners and family offices to design and implement tax-efficient philanthropic solutions using Donor Advised Funds (DAFs), increasing client acquisitions and driving over \$500 million in annual contributions.• Build and maintain strategic relationships with high-net-worth individuals and institutions, guiding them through complex giving strategies to maximize charitable impact and strengthen long-term donor engagement.• Partnered with internal teams to enhance the DAF offering, resulting in significant growth in new clients and increased overall fundraising efforts.
Business Development Executive Morningstar 2021 – 2022	<ul style="list-style-type: none">• Exceeded sales targets by delivering customized product demonstrations and executing strategic territory plans, addressing complex client business needs with Morningstar's research, software, and data solutions.• Conducted tailored sales presentations and meetings, driving new business development and maintaining a strong pipeline of high-revenue prospects.• Developed and implemented territory strategies that maximized revenue opportunities, solving critical business challenges for clients using Morningstar's full suite of solutions.
Branch Manager TD Ameritrade 2018 – 2021	<ul style="list-style-type: none">• Acted as the primary point of contact for high-net-worth clients, fostering strong relationships through exceptional service and follow-through.• Developed business plans with measurable goals positioning branch to outperform national sales rankings and consistently exceed targets by 5-25% each quarter.• Led seminars for qualified prospects, enhancing client retention and contributing to the branch's overall success.• <i>Recognitions: Great Lakes Producing Branch Manager MVP, Goal Planning Captain, Lake Michigan Region</i>
Manager, Financial Services & Financial Advisor Prudential Advisors 2012 – 2018	<ul style="list-style-type: none">• Created and delivered training programs for financial advisors, boosting their ability to identify client needs and drive sales growth.• Led high-net-worth sales and complex cases, driving a 30% increase in client meetings, growing joint fieldwork from 0% to 50%, and ensuring portfolio growth.• <i>Recognitions: Rookie of the Year, Top Financial Professional in the Midwest Financial, Masters Council, Pathways Presentation Certified</i>

EDUCATION, CERTIFICATIONS AND SKILLS

Education	University of Illinois at Urbana-Champaign B.A. Political Science, Minor: Business – <i>Graduated with Distinction, Dean's List</i>
Certifications	Certified Exit Planning Advisor (CEPA), 2024 FINRA Series 7, 24, 63, 65 (inactive)
Skills	Public speaking, complex assets, hedge funds, private equity, Salesforce, Excel, data analysis, relationship management, cross-selling, Zoom/Webex