

SHEP BURR

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SUMMARY

Results-driven leader with a distinctive record of insightful analysis, transformative strategies, and dramatic profit growth.

LEADERSHIP

- **Research, analyze, and devise client business, marketing, and sales strategies to increase profits.** Help business owners with up to 70% profit growth within 12 months for national (including publicly traded), regional, localized, and foreign businesses. Certified Exit Planning Advisor. *Kingfisher Growth Strategies*
- **Developed business strategies to achieve turnaround of a challenged business,** tripling assets to \$15.5 billion and delivering company's best financial performance in more than a decade. *ASB Investment Management*
- **Analyzed and re-positioned established company,** led marketing and sales, and played key role in integrating an acquisition, tripling fee revenue to plus-\$20mm and quadrupling targeted assets to \$2.2 billion. *Chevy Chase Trust*
- **Created and executed business strategies that spurred firm to more than sixfold growth** and \$5 billion in assets, establishing its premier reputation in peer group. *Landon Butler & Company*
- **Led regional office** with business-planning and P&L responsibility for one business and sales oversight for another. Promoted to Division Partner in record time for country's largest firm in its category. *Trammell Crow Company*
- **Developed and led Inc. 500 start-up company regional team** located in five cities. Critical role in company's 500% sales growth, to \$12mm. *Outline, Inc.*
- **Developed winning national promotion business plans** and test-market television advertising in highly-competitive brand management program. *The Procter and Gamble Company*

PROVEN SKILLS

- Business analysis, strategy, and planning
- Marketing and sales strategy and management
- Focused priority management/problem solving
- Identifying innovative opportunities
- Leading, hiring, and training winning teams
- Product development, positioning, and branding
- Channel and category development
- Compelling sales and presentation abilities
- Institutional capital raising and investor relations
- Thought-leadership and public relations

EXPERIENCE

KINGFISHER GROWTH STRATEGIES—*Naples, Florida 2016-present*
Profitable Outcomes

President

Growth strategy consulting. Identifying big ideas that can take profits to the next level. Achieved outstanding outcomes for nineteen companies to date, by constructing innovative business, marketing, and sales strategies. kingfisherconsulting.com

INVESTMENT MANAGEMENT DIVISION / ASB CAPITAL MANAGEMENT / B.F. SAUL COMPANY—
Washington, D.C., 2009–2015

President

Turned around business after stemming significant asset redemption and personnel turnover at this large cap equity and core fixed income institutional investment management business. Successful strategies included:

- Developed, launched, marketed, and managed sales of a new equity index fund that attracted \$7 billion in commitments, 100-plus pension plan investors, and recommendations from 24 institutional investment consulting firms. Further expanded product line by introducing two new active equity styles.
- Created an insurance company sales category, resulting in 10 accounts and \$100mm in assets.
- Opened a new institutional consultant/investor sales channel through eight data platforms (e.g. Morningstar, eVestment Alliance, PSN), overseeing all query responses. Initiated and managed new high-net-worth/mass-affluent financial advisor category through five investment platforms, including Envestnet and UBS.

CHEVY CHASE TRUST / B.F. SAUL COMPANY—*Washington, D.C., 2004–2009*

Senior Vice President

Led positioning analysis and re-branding of high-net-worth investment management business. Managed marketing and sales, creating detailed annual plans that laid out opportunities, strategies, and tactics.

- Leveraged bank branch and customer network to introduce and sell services; incentivized and trained existing relationship managers to upsell.
- Identified philanthropy thought-leadership as a competitive differentiator, resulting in market credibility and high-profile exposure (including sponsorship of an academic study, a front-page story in *The Washington Post*, three large philanthropy symposiums, and a televised presentation).
- Analyzed, developed, and launched new product for affiliated firm: the ASB Focused Core Fixed Income Fund. Also led a re-work of presentation strategy, including product re-label, which supported 250% growth in the ASB Allegiance Real Estate Fund, to \$1.7 billion in assets.

LANDON BUTLER & COMPANY—*Washington, D.C., 1992–2004*

Senior Vice President and Partner

Through analysis, strategy development, marketing, and sales, drove growth in real estate and venture capital assets under management from \$0.7 billion to \$5 billion, including establishing one of the largest institutional real estate funds in the U.S.

- Co-chaired \$4.5 billion equity real estate fund Operating Committee.
- Co-founded, developed, launched, marketed, sold, and variously served on the management committees of six additional, successful real estate and venture capital investment funds.
- Achieved a near-100% win record in competitive sales presentations to pension fund boards.

TRAMMELL CROW COMPANY—*Philadelphia, Pennsylvania and Washington, D.C., 1986–1992*

Division Partner

- Led one of firm's two offices in the Philadelphia region, with business-planning and P&L responsibility for an eight-person retail development business and leasing team oversight of a two-million square foot commercial and industrial portfolio. Closed more than \$100mm in lease transactions and oversaw key development stages for three shopping centers with total costs of \$50mm.

OUTLINE, INCORPORATED—*Chicago, Illinois, 1983–1985*

Western Manager

- Recruited as the second Midwest Sales Representative for this *Inc. 500* start-up trade show display manufacturer. Quickly promoted to Western Manager and built 33-person sales organization, through recruitment, training, management, and variously opening new markets, in Chicago, Los Angeles, Minneapolis, Seattle, and Cincinnati.

THE PROCTER AND GAMBLE COMPANY—*Cincinnati, Ohio, 1981–1983*

Assistant Brand Manager

- Selected for highly-competitive brand management program. Developed national promotion business plans for Cascade dishwashing detergent. Oversaw advertising for test-market dishwashing liquid. Chosen for three-person brand roll-out team for company's largest product acquisition to that time.

EDUCATION

DARTMOUTH COLLEGE—*Hanover, New Hampshire, 1981*

B.A., Government

CORPORATE BOARD and MANAGEMENT COMMITTEE EXPERIENCE

- Board Member, privately-owned company.
- Management Committee Chairman, ASB Investment Management.
- Operating Committee Co-Chairman, Multi-Employer Property Trust.
- Management Committee Member: Chevy Chase Trust, and Consortium Partners 1, 2, and 3.

NON-PROFIT BOARD EXPERIENCE

- Board and Executive Committee Member: Greater Washington Boys and Girls Clubs and The Salvation Army of Washington, D.C.
- Senior Warden and Vestry Member, St. Peter's Episcopal Chapel and Christ Church, Georgetown.
- Founding Board Member, Rebuilding Together Philadelphia.
- Board Member, Washington Scholarship Fund.
- Corporate Board Member, Arena Stage.
- Advisory Council, Lyndhurst (preservation of a historic house in Tarrytown, New York).
- President, City Tavern Preservation Foundation (preservation of a historic building in Georgetown, D.C.).

ADDITIONAL NON-PROFIT VOLUNTEER EXPERIENCE

- Job Coach, A Wider Circle.
- Co-Chair, Greater Washington Boys and Girls Clubs Congressional Dinner (largest annual fundraiser).
- Big Brother in three different cities (Jewish Social Service Agency Young Volunteer Award).