

Nathan M. Herbst

Sales and Management Professional

Results-driven leader with extensive experience in consultative sales, Internal and External Wholesaling, and the ability to manage teams, leading them through innovative changes in products, processes, and technology. Areas of expertise and licensing include:

- Real Estate Agency-Full Service Broker ▪ Relationship Management ▪ Technology Implementation
- Telesales/Operations Management
- Wholesaling ▪ Life Insurance ▪ Annuities (VA and Fixed) ▪ Marketing/Social Media

Professional Experience

Broker Associate (Real Estate Agent) 12/11/2017 – Present

Baird & Warner. Chicago, IL- Libertyville, IL Office 200 N Milwaukee Ave. 60048 STE 77

- Providing professional real estate agency services to buyers, sellers and investors in Northern Illinois and internationally by referral.
- Real Estate Consultation services such as valuation, property management, and renovation.

Regional V.P. of Wealth Management (Financial Consultant) 11/1/2015 – 12/11/2016

*Buckeye Wealth Advisors (Clearing through: **Securities America**). Hawthorn Woods, IL.*

- Providing clients with consultation on mutual funds, life insurance, variable annuities and other retirement income and/or wealth transfer products and their placement.

Sr. Regional Marketing Specialist (Hybrid Internal/External Wholesaler) 1/23/2008 – 5/29/2015

AIG (Sun America), Schaumburg, IL

- Provided Telesales/live consultations for Major Wire House financial advisors and support staff on product details, compliance requirements, technology support, and sales presentations.
- Coordinated and traveled to regions to provide variable annuity product training and assistance with client sales meetings and seminars for wire house and regional financial advisors.
- Provided onboard training for new internal wholesaling employees.
- Selected to Test and train internal sales team on newly implemented hardware, software, and business continuity planning.
- Consistently exceeded \$60 million sales goal and 25%+ market share in territory.
- Consistently ranked in top 10 for total sales and top 5 for market share.
- Gained functional working knowledge of 20+ proprietary and national brand insurance and financial technology systems.

Team Leader-Internal Wholesaler

11/2006 – 1/2008

Prudential Financial, Buffalo Grove, IL

- “Player/Coach” leading Internal Sales Team to goal setting, sharing best practices, sales ideas, and provide conduit for communication between departments.
- Consistently achieved/exceeded \$60 million annual sales goal.
- Onboarding/ongoing training of new hires and developed retention programs. Turnover dropped from 37% to 12% post implementation
- Drove training on variable annuity block of business acquired from Allstate for entire Internal/External Sales Force.
- Obtained required NASD series 26 license

Regional Sales Consultant (Internal Wholesaler)

11/2003 - 11/2006

Allstate Financial/Prudential Annuities, Northbrook, IL

- Leveraged product knowledge and operational experience to assist Financial Advisors at major wire houses with direct sales to their clients.
- Responsible for preparing and delivering hypothetical illustrations and sales presentations as well as delivering training for financial advisors in annuity products and their uses.
- Regional travel and telephone wholesaling. Responsible for aggressive sales targets in fixed and variable annuities.
- Exceeded 2005 sales goal of \$39 million in variable annuities by 15%.
- Obtained required NASD series 63 and IL Life Insurance License

Unit Manager- Image and Document Services

5/2002 - 10/2003

Allstate Financial, Vernon Hills, IL

- Led team of 23-30 direct reports in the design, implementation, and execution of the image and document scanning services department for Allstate Financial.
- Worked with vendors to establish requirements and implement new technologies.
- Managed day-to-day activities for multiple functions including the operation of mail sorting and imaging equipment, data collection functions, client financial services and file retention and retrieval.
- Obtained NASD series 6 license

Education & Skills

- Colorado State University-- Ft. Collins, Colorado

Bachelor of Liberal Arts – concentration in Theater: Directing/Acting (Extensive work with “Improv” Training/Performances and oration)

- Consultative Sales Training (Sequoia), Top Gun Sales Training, Microsoft Office Suite, Salesforce.com, Lotus Notes, Vendor/Procurement and Project Management., Seibel, Janna, Kodak Imaging and Input Accel Imaging Package, AnnuityExpress, AnnuityPro (Bluefrog), vBulletin, Sketchup, Blender, PhotoShop

Hobbies and Interests

- **Officer-Membership and Vendor Liaison Chicago Marine Aquarium Society** 4/2019-present
- Founder/Owner of www.chicagolandreefs.com 11/2013-present
 - Forum and online resource for vendors and marine aquarium enthusiasts in the greater Chicagoland area. (Courses on HTML coding and SEO)
 - Managing staff of 6 provides trade-show and event coordination for membership/sponsorship drives, educational outreach, and support of “responsible reefing” in all forms.
- Cub-Master for Cubscout Pack 189, Den Leader for Cub Scout Dens 1 and 3.
- Member-Lake County FPV Drone Racing League