

# LOU ANN MATOSSIAN

## SELECTED EXPERIENCE

### **Financial Advisor**

2019–2020

Morgan Stanley, *Minneapolis–St. Paul*

Help investors define and strive to meet financial goals by delivering a vast array of resources in the way that is most appropriate for how they invest and what they want to achieve. Strategic partner of Graystone Midwest, a boutique institutional endowment consultancy. Dual employee of Wealth Management and Private Bank.

- Acquired \$1 million AUM in first eight months of practice; licensed in 11 states.
- Marketed through social media, website, cold calls, referrals, seminars, networking.
- One of six FA associates (top 10%) recognized at national sales training conference.
- Specialized in aligning investments with social values and philanthropy.

### **Director of Stewardship, Co-Treasurer, Board Vice-Chair**

2016–2019

St. Sahag Armenian Church, *Minneapolis–St. Paul*

Manage church accounting, budgeting, cash deposits, donor records, and fundraising campaigns. Present to board members from non-finance backgrounds.

- Built a professional, 6-figure annual fundraising program from the ground up.
- Earned GuideStar Platinum recognition.

### **Sales Associate**

2015–2016

Williams-Sonoma, *Minneapolis–St. Paul*

Build productive upscale client relationships through face-to-face engagement, customer service, pricing and product knowledge, gift registries and presentations, close, and follow-up. Work collaboratively in fast-paced environment with tight deadlines for direct sales. Support business development and corporate philanthropy.

- Sold more than \$14,000/week FTE (over \$300/hr.) in highest-grossing month.

### **Director of Development**

2013–2015

Diocese of the Armenian Church of America (Eastern), *New York City*

Chief development officer accountable for 25% of a \$4 million budget. Lead annual campaigns. Manage staff and volunteers. Analyze and interpret historical data. Design, write, and oversee persuasive direct mail marketing communications. Set benchmarks, research and develop prospects, and promote stewardship. Drive competitive strategy, manage vendors, and strengthen capacity for fundraising.

- Raised more than \$700,000 in annual giving and received \$300,000 in bequests.
- Increased annual giving by 7% and participation by 9%.
- Reduced costs by \$60,000 through improved segmentation and targeting.
- Created feasibility study for a \$10 million capital campaign.

**Class Agent, Annual Fund** (volunteer) 2012–2014  
Swarthmore College, *Philadelphia*

Compose direct-mail appeals to alumni of a top-three elite liberal arts college.

- Led class giving from \$95,345 in FY13 to \$172,606 in FY14, an increase of 80%.
- Kay Bassett Award for the greatest year-over-year revenue growth from donors.

**Program Director, Program and Public Affairs Officer** 2000–2011  
Cafesjian Family Foundation, *Minneapolis–St. Paul*

Reporting to the executive director, establish and implement all aspects of a \$53 million family foundation's charitable grants program. Manage grantee relationships.

- Managed some 500 grant proposals, resulting in total awards of \$9.7 million.

## PROFESSIONAL DESIGNATIONS AND CERTIFICATES

**Series 7 & 66; MN Insurance Producer; Mortgage Loan Originator** 2019

**Certified Fund Raising Executive (CFRE)** 2018

**Chartered Advisor in Philanthropy (CAP)** 2018

**Small Business Essentials Entrepreneur** 2018  
*WomenVenture, Minneapolis*

**Religious Fundraising Executive; Nonprofit Executive Leader** 2016–2018  
*Indiana University, Lilly Family School of Philanthropy, Indianapolis*

**Public Relations Specialist** 2013  
*Takoda Institute of Higher Education, Minneapolis*

**Fundraising Manager** 2011  
*Indiana University, Lilly Family School of Philanthropy, Indianapolis*

## SELECTED SKILLS

- **Relationship management, CRM** (Salesforce, 3D, Bloomerang, DonorPerfect)
- **Financial planning** (Goals Planning System, LifeView MoneyGuide Pro)
- **Investing** (WealthDesk, Aladdin, 3D, Impact Quotient, mobile app)
- **Social media for professionals** (LinkedIn, Hearsay)
- **Administration** (Word, Excel, PowerPoint, 3DR intranet, workflow, purchasing)
- **Research, writing, public speaking** (book to be published in 2020)

## EDUCATION

**Doctorate (Ph.D.), Linguistics; Master's (M.S.), Education**  
*University of Pennsylvania, Philadelphia*

**Bachelor's (B.A.), Linguistics and English Literature**  
*Swarthmore College, Philadelphia area*