S H E R R I L L S T . G E R M A I N , M B A , C F P ®

W W W . T H E F I S I D E . C O M

PROFESSIONAL EXPERIENCE:

TheFISide.com, Auburn, CA   2016-Present
Freelance Personal Finance Writer, Create personal finance content for financial services firms, professional organizations, and the financial media. Unique ability to convey complex concepts in accessible, engaging style. Services include articles, website copy, white papers, reports, and ghostwriting for online and print publications.

New Means Financial Planning (New Means, LLC), Hollis, NH   2001-2013
Owner/Principal, Built fee-only financial planning firm, providing objective advice that enabled clients to reach their personal financial goals. Services included advice on investments, retirement, career change, college, insurance, cash flow, debt, income taxes, estate planning.

Accomplishments:

- Grew the company an average 21% annually through print and social media, monthly newsletter (a two-time Constant Contact All Star), professional and client referrals, in-person and virtual seminars.
- Created a marketing presence that accurately conveyed the nature of the business and services offered, ensuring good chemistry, trust, and longevity in client relationships.
- Company success and expertise acknowledged through various media contributions:
    - Authored article Your Client's New Career, published in Financial Planning Magazine
    - Contributed to Just Give Me the Answer$: Expert Advisors Address Your Most Pressing Financial Questions by Sheryl Garrett, CFP®, with Marie Swift and The Garrett Planning Network, Inc.
    - Selected by author Pamela Skillings as resource for expertise in financial planning for career changers and contributed to her book Escape from Corporate America: A Practical Guide to Creating the Career of Your Dreams
    - Coauthored Job-Hunt site article
    - CNBC quote
- Maintained currency with industry trends, planning strategies and technologies, and practice management techniques through professional networks, conferences, and study groups.
- Coordinated 20+ financial planners to develop and deliver National Association of Personal Financial Advisors (NAPFA) virtual practice management training to new fee-only planners. Instructor for Business Planning module.

KANA Software (formerly Silknet Software), Manchester, NH 1997-2001
Sr. Product Marketing Manager, Specified requirements and steered development of state-of-the-art, web-based Customer Relationship Management product. Gathered customer feedback, market research, and competitive information. Communicated targeted product information to customers, prospects, partners, analysts, and employees via written documentation, one-on-one interactions, formal product training, trade show presentations, and webcasts.

Accomplishments:

- Key player in the growth from pre-IPO to successful public company due to ability to coordinate virtual and cross functional teams, manage and communicate product roadmap and timelines.
- Created mock-up user interface illustrating vision for how combined product suite of KANA and Silknet would deliver the industry's first complete multi-channel, web-based Customer Relationship Management solution, facilitating the merger of the two firms.

Client Principal, Refined client-site product implementation process. Led referenceable client projects that were the foundation for KANA's 300%+ annual revenue growth through 2000.

Mentor Graphics (formerly Viewlogic Systems, Inc.), Marlborough, MA 1990-1996
Manager, Software Engineering Group, Managed 6-person team responsible for developing and deploying automated build and test system that facilitated simultaneous delivery of multi-product, multi-platform release.

Senior Software Engineer, Established programming standards, product release process, and internal training program, resulting in on-time releases for 6 consecutive quarters.

EDUCATION:
Master of Business Administration, Clark University
BS Electrical Engineering, Magna Cum Laude, Tufts University
CERTIFIED FINANCIAL PLANNER™ certification, College for Financial Planning®