Adam J. Nalitz

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Director – Advisory Center of Excellence

► **Process-Driven & Change Management Catalyst –** Constantly seeks opportunities to transform the organization by pioneering forward-thinking continuous process improvement plans focused on standardization. Proven history of streamlining processes, increasing efficiency, reducing costs, and driving profitability while enhancing the customer and user experience. Passionate about identifying inefficiencies through data evaluation, developing roadmaps, and recommending cutting-edge, automated, value-added solutions. Skilled at driving key project execution for large enterprise initiatives defining scope, design, managing timelines and budgets for exceptional project delivery.

FUNCTIONAL SKILLS

- Client Relationships
- Sales/Business Development
- Business Strategy/Integration
- Technology/Business
- Change Management
- Project Management
- Continuous Improvement
- Process Transformation
- Streamline Workflows
- Cross-Functional Teams
- Customer Onboarding/Training
- Presentation Skills
- Revenue Profit & Growth
- Strategic Relationships
- Regulatory Compliance
- ESG
- Risk Management
- Retirement Plans/Pensions

EXPERIENCE

TIAA **March 2023 – Present**

Director – Advisory Center of Excellence

- Identified, planned, and executed strategic advisory engagements within assigned areas of responsibility
- Lead highly complex, large, and cross organizational strategic initiatives with companywide impact
- Establishing effective controls, procedures, and quality assurance processes for Wealth Sales Enablement and Wealth Distribution initiatives. Ensuring projects/initiatives are executed in compliance and abides by TIAA internal control environment, established business guidelines, and TIAA policy.
- Fostered collaborative strategic partnership with business areas across the organization that are actively seeking to grow or enhance their division.
- Provide expert guidance through consultation for the deployment of products, services, or processes.
- Lead challenging engagement negotiations with clients, peers and executives in a proactive, professional and productive manner.
- Identify and implement best practices across TIAA

WELLS FARGO **April 2021 – March 2023**

VP, Corporate & Investment Banking – Business Execution Services

Responsible for leading and executing high priority work efforts across Corporate Investment Banking

- Responsible for driving initiatives in support of CIB strategic priorities and alignment to broader enterprise priorities, with specific accountabilities driving the business and program management for Regulatory and the Environmental, Social, Governance (ESG) programs
- Lead regulatory execution teams within business execution services team
- Design solutions and define process changes for core team with business applicability
- Engage with senior leaders across the Front Office, Legal, Risk, Compliance, IT and the Control Executive office
- Consult with internal clients and business to preform problem analysis, solution implementation, and change management
- Leading efforts with multiple stakeholder groups to influence executive decision-making and successfully negotiate critical issue resolution related to program initiatives
- Knowledge of best practices and systems for managing records and information management risk
- Improve capacity and resource management processes, leveraging, and implementing technology initiatives utilizing offshore resources to foster customer success.

NUVEEN (FORMERLY TIAA) **September 2019 – November 2020**

VP, Global Client Service Strategy & Integration

Led execution of corporate strategy, business/program development, and collaborative initiatives across business unit

- Define, execute, and implement strategic business development programs focused on driving organizational growth. Provide operational and financial analysis to align with best practices and business objectives.
- Conceptualize and lead enterprise-wide change management initiatives across portfolio and platform development.

- Initiate design and manage business cases. Identify business/client needs. Manage vendors and client relations.
- Collaborate with technology team on strategic development of innovative architecture according to business requirements. Implement plans to reduce costs and duplication and increase automation to improve efficiency.
- Formulate process monitoring plans for management to align with metrics and objectives.
- Build strong relationships with cross-functional teams to ensure collaborative environment, best practice adoption/integration. Develop tools to promote customer excellence.
- Devise frameworks for identifying issues, collecting data, providing key insights and input for fact-based solutions.
- Developed strategic and tactical Global Client Services roadmap to align with Steering Committee.
- Instrumental in designing the process for centralizing and streamlining >13 affiliates disparate systems, processes, workflows, and client services procedures. Minimized duplication and contradictory costs by 30%.

TIAA-CREF **December 2009 – August 2019**
Transition Relationship Manager- Institutional Client Transitions, 2014 – 2019
Senior Project Manager/Business Analyst – Client Acquisition Group/Advice & Planning, 2009 – 2014
Held multiple simultaneous roles gathering and analyzing business requirements, managing key business/technology projects while driving the sales process, onboarding process and client experience for Institutional clients.

- Led client onboarding for universities, municipalities, and hospitals on 403B retirement plans. Managed customer expectations, communications, legal/compliance, training, and overall relationship/experience to align with internal partners from engagement to delivery.
- Streamlined client onboarding process, increased engagement 200% per year as a result of process simplicity while reducing time and costs. Reduced Onboarding costs by 90%.
- Traveled to client sites to conduct presentations to HR leaders & CFO's as main point-of-contact.
- Aligned business objectives in collaboration with sales team. Developed and presented compelling service offerings/products to drive revenue.
- Monitored project production versus infrastructure capacity, provided critical input for scope/schedule adjustments to maximize efficiency/execution.
- Led key projects; status meetings, milestones, budget, vendors, schedules, functional requirements, and 50 staff in six diverse locations for: technology, business operations, marketing, compliance, legal matters, wealth management advisors, central advice group and planning.
- Developed and implemented scalable, sustainable end-to-end processes, services, solutions, and best practices for client acquisition in collaboration with cross-functional teams and partners through comprehensive evaluation. Designed and integrated tactical business workflows and processes to streamline operations.
- Led innovative brand creation for instant retirement enrollment. Mentored team on best practices and standards.
- Instrumental in strategic planning, developing, marketing and successful launch of first iPad retirement savings app focused on conveying importance of monthly retirement contributions.
- Pioneered key corporate initiative designing/implementing state-of-the-art sales process to streamline customer experience, utilized table technology offerings for instant retirement plan enrollment. Resulted in 87% customer satisfaction rating.

ADDITIONAL EXPERIENCE

Wells Capital Management, (Formerly Evergreen Investments)
Client Reporting Manager- Information Reporting Group

Evergreen Investments
Investment Business Analyst – Front Office Group/Assistant Vice President

Barclays Global Investors
Business Development – iShares Sales Team/Team Leader

First Union National Bank
Assistant Vice President – Municipal Securities Group

EDUCATION AND LICENSURE

Master's Degree – Business Administration, MBA, West Virginia University, Morgantown, WV

CIMBA Program - Studied abroad in Asolo, Italy - International Business Studies Coursework

Bachelor's Degree, West Virginia University, Morgantown, WV

FINRA Series 7 General Securities Representative **|** FINRA Series 63 Blue Sky Laws