

Sarah Rubinstein

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SUMMARY

Results-driven Senior Program and Content Manager with eight years of extensive experience in the dynamic realm of event planning and corporate environments. Proven expertise in planning and executing impactful conferences, including content creation, agenda development, and technology implementation tailored to the unique needs of the wealth management industry. Specialized in curating relevant topics, including multi-generational investing, philanthropy, succession planning, and financial services. Adept at seamlessly blending strategic vision with operational execution to deliver innovative, progressive, and engaging experiences.

EXPERIENCE

FOX (Family Office Exchange), Chicago, IL

11/2020-Present

Senior Program and Content Manager

- Lead Project Manager and head of Zoom operations for all virtual event webcasts (> 100+ attendees).
- Develops and manages the organization's programming from inception to completion including subject matter expert outreach, onsite operations, and post-event analysis to maximize ROI.
- Oversees event descriptions, content creation, agenda development, and email campaigns for complex, multi-day, in person/virtual forums and workshops pertaining to ideas and trends relevant to the wealth and financial industries.
- Spearheads the creation and distribution of custom reports and presentations for high-net-worth individuals, ensuring clarity and transparency in financial performance and investment strategies.

Event Planner

- Manages event technology needs, website builds, and registration using CVENT, Drupal, and CRM.
- Coordinates and implements key initiatives, including program launches, content calendars, and communication plans, contributing to increased audience engagement and brand recognition.
- Manages FOX's speaker database with over 1,000 qualified subject matter experts in an assortment of areas such as Finance, Technology, Succession Planning, and additional niche Family Office topics.
- Creates and manages membership satisfaction surveys via Qualtrics and Power BI.

Gartner, Chicago, IL

08/2018-05/2020

Conference Planner

- Managed Zoom and WebEx webinar set-up including speaker operations and logistics.
- Provided project and event management support for a collection of 100+ events annually for CFO's, CIO's, and CEO's.
- Responsible for full onsite event ownership, contracting, branding, and onsite execution.
- Created event page websites and adjusted updates accordingly using RainFocus, CVENT, and Eventbase Technology.

Sodexo-Chicago Botanic Garden, Chicago, IL

12/2017-07/2018

Special Event and Wedding Sales Coordinator

- Manager and lead contact of the Group Tours and Private & Special Events Department.
- Created and managed BEO's, Invoices, and scheduling using Caterease and EMS.

Sodexo-U.S. Patent and Trademark Office, Alexandria, VA

01/2017-11/2017

Reservations Coordinator/Events Manager

- Managed and coordinated resource and space utilization using Event Management System (EMS) and Social Tables.
- Promoted to Event Manager position - liaison for government contractor Sodexo and the USPTO.

SKILLS - PROJECT MANAGEMENT - CUSTOMER ENGAGEMENT- COMMUNICATION – ORGANIZATION - PROBLEM-SOLVING

Microsoft [Excel, PowerPoint, Word, SharePoint, Power BI], **Adobe** [Photoshop, Premiere, Rush] **Salesforce, CRM, EMS, Qualtrics, CVENT, Invoicing/BEO's/RFP's, Opera, Delphi, Zoom, RainFocus**

EDUCATION

Indiana University, Bloomington – Bachelor of Science

Major: Event Management / Minor: Marketing, Kelley School of Business