

DIANA SCHNEIDMAN, CLU, CPCU, CMFC

(formerly Diana Cohen Harris)

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MARKETING COMMUNICATIONS / WRITER / RESEARCH REPORTS

- ▶ Research / White Papers
- ▶ Mutual Funds Commentary
- ▶ Web Content: SEO, optimized copy
- ▶ LinkedIn, Twitter, Facebook
- ▶ Newsletters / Direct Mail
- ▶ PowerPoint presentations

PROFESSIONAL EXPERIENCE

MARKETING, WRITING, RESEARCH

2003–Present

- ▶ Complete diverse writing and editing assignments for insurance, business, education and résumé clients.
- ▶ Coach freelancers and consultants on how to start getting clients.
- ▶ Organized formal competitive intelligence program for large engineering-consulting firm. Negotiated selection of key competitors and established ongoing process.

FINANCIAL WRITER, CALAMOS ASSET MANAGEMENT, INC., Naperville, IL

2000–2003

Financial writing and project management for rapidly growing investment management firm. Worked with executive, legal, research, and accounting departments to meet strict regulatory standards.

- ▶ Produced marketing and sales newsletters, market commentaries, web content, and collateral for diverse audiences: institutional, separate account/wrap (including Merrill Lynch, UBS PaineWebber, Salomon Smith Barney, Morgan Stanley, Wachovia, and Prudential Securities), mutual funds, and hedge funds. Strategies included equity, convertible bond, global, high-yield bond, and market neutral / alternative.
- ▶ Published scholarly articles with guidance of company founder / president under his byline. Maintained relationships with editors of financial journals.
- ▶ Prepared highly technical reviews of each month's portfolio performance for major institutional clients.
- ▶ Compiled daily market / company update for internal staff with exceptional accuracy and thoroughness, meeting early-morning deadlines.
- ▶ Responded to prospect and client proposal requests. Maintained content for RFPs.

EDITORIAL CONSULTANT / FREELANCE WRITER (specializing in financial / insurance)

1998–2000; 1992–1996

Created roster of over 100 clients, including major corporations and associations, through comprehensive marketing program and website.

- ▶ Consulted with clients and wrote marketing and research reports, articles, direct mail, and collateral. Representative clients: Allstate Insurance, Northwestern Mutual Insurance, Northbrook Insurance, Nationwide Insurance, American Family Insurance, CNA Insurance, Zurich Insurance, T. Rowe Price, Colonial Mutual Funds, Central Benefits Mutual Insurance, Family Health Plan, Charles Schwab, Demotech, and International Foundation of Employee Benefit Plans.

EDITORIAL CONSULTANT / FREELANCE WRITER (specializing in financial / insurance) *cont.*

- ▶ Published articles in general-readership publications and trade journals. Representative publications: Business Journal (Milwaukee), Wisconsin Broker, Peoria Journal Star, and Ohio Underwriter.
- ▶ Conducted competitive intelligence research, including in-depth telephone interviews.

FINANCIAL WRITER, CATERPILLAR INVESTMENT MANAGEMENT LTD., Peoria, IL 1996–1998

Wrote and managed marketing projects for investment subsidiary of Fortune 50 company.

- ▶ Wrote for The Preferred Group of Mutual Funds: Growth, Value, International, Small Cap, Asset Allocation, Fixed Income, Short-Term Government, and Money Market.
- ▶ Composed quarterly newsletters and reader-friendly educational materials for 401(k) service.
- ▶ Surveyed institutional clients and employed their input in reshaping quarterly newsletter to address audience needs without overtaxing internal resources.

MARKET RESEARCH & PLANNING, NATIONWIDE INSURANCE COMPANIES, Columbus, OH 1980–1992

Conducted secondary research and participated in primary research administration. Established departmental library of information resources.

- ▶ Organized competitive intelligence profiling effort. Answered ad hoc CI queries, largely through contacts with home office and field sales personnel as well as industry associations.
- ▶ Crafted corporatwide and region-specific reports on market-research findings with astute conclusions and recommendations.
- ▶ Gathered data and prepared documentation for corporate planning initiative.

ASSISTANT TO THE STATE LIBRARIAN AND MARKETS DEVELOPMENT ASSOCIATE, THE STATE LIBRARY OF OHIO, Columbus, OH 1973–1980

- ▶ Coordinated Ohio White House Conference on Library and Information Services, including series of regional meetings to develop citizen recommendations. Led statewide steering committees of professional and citizen leaders.

EDUCATION / TRAINING / PROFESSIONAL MEMBERSHIPS

DOMINICAN UNIVERSITY, Graduate School of Library and Information Science, River Forest, IL, “Knowledge Management”

KENT STATE UNIVERSITY, Kent, OH, MLS, Master of Library Science

OHIO STATE UNIVERSITY, Columbus, OH, B.S., English and French Education

Chartered Mutual Funds Counselor (CMFC); Chartered Property / Casualty Underwriter (CPCU); Chartered Life Underwriter (CLU); Certified Professional Résumé Writer (CPRW)

MEMBER:

Independent Writers of Chicago (IWOC); Chicago Women in Publishing (CWIP); Toastmasters, Riverwalk Chapter, Naperville IL, Vice President of Membership; Professional Association of Résumé Writers (PARW)

ONLINE PRESENCE:

<http://www.DianaWrites.com> (freelance writing and research)

<http://www.StandUp8Times.com> (how to start freelancing and consulting)

<http://www.StandUp8Times.com/blog> (blog)

<http://www.StartFreelancingandConsulting.com> (sales page for ebook I wrote)

Twitter: <http://twitter.com/DianaSchneidman>

LinkedIn: <http://www.linkedin.com/in/dianaschneidman>

Facebook: <http://www.facebook.com/profile.php?id=1212729542>