MWSA - BOARD OF DIRECTORS
NOMINATION FORM

PLEASE TYPE OR PRINT

Nomination Position: Treasurer

New Nomination: Dan Rosentreter

Returning Director: _______ If yes, are you interested in the same position? ___ YES ___NO

_______ President __x_____ Treasurer

_______ Vice-President

_______ Director

Nominee's Full Name: Dan Rosentreter_______________________________ Member: _yes____

Address: _________1262 Lorette Ave_________________ City: Winnipeg____ Province:_MB_______

Telephone: (work)204-944-5057_ext 232______ (res.) 204-296-3904 (fax) _204-942-4735____________ e-mail danrosentreter@yahoo.com_________________

Area of Expertise: _finance, sales________________________________

Consent by the Nominee:

I, (please print) _Dan Rosentreter____________________________, hereby allow my name to stand for nomination.

Dan R
____
Signature of Nominee

Nominated by:

Name of Individual : Dan Rosentreter

Address: " " City: " " Province: " "

Telephone: (work) " " (res.) " " (fax) " " e-mail " "

" "
____
Signature of Nominator

Please return to:	**Nominations Committee** **c/o Manitoba Wheelchair Sport Association** **145 Pacific Ave** **Winnipeg, Manitoba** **R3B 2Z6**

For more information please contact MWSA at 925-5790 or email mwsa@sportmanitoba.ca.

Nominee Profile

Name: Dan Rosentreter

Volunteer Experience (past ten years)

Mentor at Bolder Options 2004-2006 (at risk youth program in Minneapolis)
Assistant Hockey Coach – Minnehaha Academy 2005-2006
Deer Lodge Curling Club – board member 2007-2012

Skills

Sales
Financial Planning

Education

St. Cloud State University – bachelor of science double majoring in Commerce and Economics
Financial Planning Standards Council – Certified Financial Planner

Work Experience

Securities Trader – American Investors Group 2002-2006
Relationship Manager – EISI/Zywave 2006-2013
Financial Advisor – CIBC 2013- present

Additional info:

Daniel H. Rosentreter

1262 Lorette Ave
Winnipeg, MB R3M 1W5
204-296-3904
daniel.rosentreter@cibc.com

Experience

CIBC Imperial Service

Financial Advisor 2013 -

- Provide retirement planning and retirement distribution advice
- Advise clients on investments
- Develop debt reduction/cash management strategies
- Create secondary education funding strategies
- Develop succession planning strategies
- Provide lending solutions, including mortgages, lines of credit, personal loans
- Client base includes roughly 250 households

Zywave (formerly EISI) 2006 – 2013

Relationship Manager 2009 – 2013

- Managed strategic client partnerships with several of North America's largest banks and financial planning institutions
- Worked closely with financial advisors either selling financial planning software solutions or integrating software solutions into their practice
- Successfully retained 100% of my 15 managed accounts from 2011-2013
- Successfully closed an enterprise account from start to finish that had been pursued by Zywave numerous times over a 10 year period
- Increased sales by over 40% within a two year period with two enterprise accounts
- Played a lead role in negotiating several long term contracts
- Devised a solution for a disgruntled corporate account that resulted in a long term contract with additional services being sold
- Delivered presentations to large live audiences at several industry conferences
- Assisted the sales team by managing two sales territories in Q2/Q3 of 2012

Product Consultant 2007 – 2009

- Worked collaboratively with the enterprise sales team selling financial planning software solutions to large prospective clients
- Initiated and drove the collection of several client success stories. These stories are currently critical pieces of information used in the sales process.
- Worked effectively with a team to complete five Requests for Proposals (RFPs) and ultimately land the business on four occasions
- Designed a sales support intranet site from scratch with no prior coding experience

Business Analyst 2006 – 2007

- Drove the design and logic for many new NaviPlan features
- Collected business requirements for several software customization projects
- Contributing member of a team responsible for delivering the largest customization project in the company's history

Securities Trader

American Investors Group, Minnetonka, Minnesota 2002 – 2006

- Managed and ran the company's trading desk
- Placed all securities transactions on behalf of our entire broker force
- Co-managed our company's investment portfolio
- Advised my own client base on suitable fixed income investments
- Regular contributing member to our company's quarterly newsletter
- Influenced President to proceed with the largest offering in company history
- Established several new trading desk policies and processes, including:
  - Created an in-depth training guide on running the trading desk
  - A defined method of submitting initial order period sales
  - Semi-weekly motivational sales updates to broker force
  - Reduced turnaround time of initial order period allocations to 1 business day from 3-5 business days

Education

B.Sc. Business Economics and Management

St. Cloud State University

- Member of Toastmasters, Management, Investment, and Economics Clubs
- Minor Bantam hockey coach
- Economics tutor