JAMIE OWEN

EXECUTIVE OPERATIONS

BUSINESS TRANSFORMATION & IMPLEMENTATION

EXECUTIVE PROFILE

Executive operations and business transformation leader with more than two decades of experience turning complex business challenges into practical, measurable solutions. Background spans acquisition integration, financial services operations, global product development, and organizational change. Combines strategic leadership with hands-on implementation, building systems that improve accountability, streamline execution, and deliver sustainable results.

SELECTED EXECUTIVE ACHIEVEMENTS

Acquisition & Integration Leadership

Led operational planning and execution during the sale of Creating & Managing Wealth and its subsequent 24-month broker-dealer transition.

Strategic Exit Readiness (Ongoing)

Recruited by The Advisor Authority to establish an exit strategy and support a potential sale of educational intellectual property; work expanded into operational improvement as readiness gaps emerged.

Systems & Accountability

Designed CRM workflows, strategy-session tracking, and sales follow-up processes to improve operational visibility and accountability.

PROFESSIONAL EXPERIENCE

THE ADVISOR AUTHORITY

Chief of Staff | Jul 2026 – Present

Strategic exit readiness • IP sale planning • Operational transformation

- Partner with executive leadership to translate strategic priorities into operating plans, deliverables, decision points, and follow-through.
- Designed strategy-session and follow-up tracking to improve visibility into sales activity, conversion performance, and accountability.
- Developed cross-functional trackers and recurring operational reviews to clarify ownership, execution gaps, and next steps.
- Directed AI-assisted analysis and resource development with human review of accuracy, proprietary content boundaries, and business relevance.
- Prepared leadership-transition and business-continuity scenarios to support executive decision-making.

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CONTACT

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CORE CAPABILITIES

- Strategic Problem-Solving
- End-to-End Implementation
- Operational Transformation
- Performance Measurement
- AI-Enabled Execution

EXECUTIVE FOCUS

- ✓ Acquisition & integration
- ✓ Strategic exit / IP readiness
- ✓ Cross-functional operations
- ✓ Systems & process design
- ✓ Performance & accountability
- ✓ AI strategy & adoption

WORKING STYLE

Define the objective.

Build the solution.

Implement it.

Measure the result.

PROFESSIONAL EXPERIENCE (CONTINUED)

CREATING & MANAGING WEALTH / LINCOLN INVESTMENT

Chief Operating Officer | Feb 2018 – Feb 2026

- Led operational planning, onboarding, and broker-dealer integration through a 24-month acquisition transition; continued leading branch operations afterward.
- Designed operating procedures and CRM-based task management to coordinate hundreds of ongoing client and operational activities.
- Led firmwide operations spanning HR, accounting, compliance oversight, technology, client service, and workflow management.
- Supported growth from $86M to more than $180M in fee-based assets under management.
- Coordinated reporting with regional leadership and supported integration of an additional advisor.

CREATING & MANAGING WEALTH

Director of Operations | Dec 2014 – Jan 2018

- Oversaw HR, accounting, technology, forecasting, client service operations, and process development.
- Supported expansion of assets under management from $51M to $86M over four years.
- Managed broker-dealer and FINRA audit preparation, regulatory processes, licensing, and renewals.
- Established client-support systems; tracked commissions and overrides and coordinated executive presentations and conferences.

PRIME ART & JEWEL

Director of Product Development | Mar 2008 – Jun 2014

- Led design, merchandising, R&D, costing, and sourcing teams responsible for approximately 650 new jewelry models monthly.
- Established a warehouse for $6M in jewelry samples and implemented software to manage a 200,000-model sample library.
- Managed an annual model-making budget exceeding $500K and negotiated labor, materials, and manufacturing costs.
- Served as global brand liaison for ELLE Jewelry & Watches across offices in Hong Kong, Canada, the United States, and Paris.

PRIME ART & JEWEL

Sales Executive | Feb 2000 – 2008

- Expanded sales with one major retail account from $1.8M to $10M.
- Developed marketing approaches adopted across major retail accounts; division sales grew from $3M to $30M (2003–2007).

EDUCATION

Bachelor of Science in Family and Consumer Sciences

Specialization: Fashion Merchandising

Minor: Business Administration and Marketing

Henderson State University | 1999

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INDUSTRY EXPERIENCE

- Financial Services (Wealth Management)
- Education & Intellectual Property
- Product Development & Global Sourcing
- Commercial Operations & Organizational Transitions

KEY TOOLS & SYSTEMS

- CRM & Client Systems
- Operational & Performance Reporting
- Process Design & Workflow
- AI Analysis & Implementation
- Project & Execution Management