

Institutional Business Development Biographies



John C. Yackel

Executive Managing Director, Head of Institutional Business Development

John oversees relationship development activities and leads efforts to help existing institutional client firms grow their business and increase sales.

A 20-plus-year veteran of the industry, John worked at Fortigent LLC before joining Envestnet. At Fortigent, he helped drive business development and develop new relationships with institutions and advisors who serve ultra-high-net-worth clients. He has specific expertise working with banks, trust companies, registered investment advisors, and family offices.

Prior to Fortigent, John spent 15 years at SEI, serving in various leadership roles in sales management, business development, marketing, relationship management, and business strategy. He was instrumental in establishing SEI's Community Bank division, where he developed new outsourcing relationships with some of the country's most progressive banking institutions. Subsequently, he developed strategic outsourcing relationships within SEI's Money Manager division, which provided proprietary accounting, administrative services, compliance, and distribution solutions. He also worked in SEI's Advisor Network group, where he held two senior positions - Midwest advisor business manager and director of sales. In these roles, he was responsible for consulting and recruiting SEI's Elite Select RIA clientele.

John earned a B.A. in economics from Bucknell University and holds Series 7, 63, and 65 licenses.



John Phoenix

Managing Director, National Sales Manager Advisory Services

John is the National Sales Manager for the Institutional Business Development team at Envestnet. He is responsible for leading the new business efforts around large enterprise firms looking to deploy the Envestnet suite of services. John supports the firm's efforts in the Bank, Independent Broker Dealer, Regional Broker Dealer and Registered Investment Advisor channels.

Most recently, John lead the High Net Worth Sales division at Envestnet working with RIAs, hybrid RIAs and Independent Advisor Networks that deployed Envestnet. John was CEO and Founder of Metamorphosis Money Management an RIA in Denver, Colorado specializing in tax transition/overlay and back office outsourcing for RIAs from 2005 through 2010 a company that he eventually sold to Envestnet. Prior to M3, John worked for 6 years as a Managing Director for Alexander Capital Management Group, where he was head of sales and marketing. Prior to that, John was a Regional Director for Putnam Investments where he led the sales and marketing efforts for the state of Florida. John also served as a Regional Director for Kemper Financial Services in Atlanta, Georgia.

John earned his undergraduate degree in History from Washington and Lee University and holds a FINRA Series 65 security license.

Todd Cooper, CIMA

Senior Vice President, Institutional Business Development



Todd develops new client partnerships and manages existing client relationships to deliver comprehensive wealth management platforms.

Todd has more than 17 years of experience in the investment management industry. Before joining Envestnet, he served as a private client investment analyst and institutional relationship manager at Neuberger Berman, where he worked closely with portfolio managers and wealth advisors to service the firm's high-net-worth and institutional clients. He began his career as an accountant at Ernst & Young LLC, where he managed audit engagements for major Wall Street investment firms.

Todd earned a B.A. in accounting from the University of Massachusetts Amherst, in 1992. He holds Series 7 and 63 securities licenses, and is a Certified Investment Management Analyst (CIMA®) and a Certified Public Accountant (CPA). He also is a member of the Investment Management Consultants Association (IMCA) and serves on IMCA's Audio Broadcast Education Committee.

Robert J. Rinicella

Senior Vice President, Institutional Business Development



Robert (Bob) Rinicella joined Envestnet in October 2016. Bob is responsible for business development for banks, independent advisors & broker dealers and insurance companies.

Most recently, Bob was the National Sales Director of the Institutional Banking group at The Bancorp, which provides a variety of private-labeled banking services to multiple national independent advisory and broker dealer platforms. As National Sales Director, Bob was responsible for all sales and sales strategy across the country. Bob was also a member of The Bancorp's Institutional Banking senior management team.

Prior to The Bancorp, Bob spent 12 years with SEI Investments in multiple sales roles across the Private Banking & Trust market unit. At SEI, Bob worked exclusively with banks, independent trust companies, and family offices. Before SEI, he held a number of sales and sales management roles across the financial services and technology sectors.

Bob earned his B.S. in Business Administration from Bowling Green State University. He previously held his FINRA Series 7 and 63 securities licenses.

Sean Lawlor

Vice President, Institutional Business Development



After graduating from Villanova University with a B.A. degree in Finance in 2003, Sean entered the financial services industry from the software solutions focus working with financial advisors to use and design a platform that would leverage their business and their client relationships. Early in his career he decided to take a position on the other end of the spectrum and worked as a Financial Advisor working with the owners of privately held, family businesses. Today his focus remains the same; optimizing the advisor/client relationship. With over 13 years of industry experience, Sean has built lasting relationships with both Advisor and Fintech Partner alike. Building the bridge between software of Advisor/Client needs has become his passion.

Sean is skilled at navigating the complex issues the advisor is faced with and strategically matching them with sound solutions. Sean and his associates strive to create the holistic solutions their users are looking for and they take full responsibility for implementation and proactive monitoring to make sure the goal is achieved. Sean's commitment to client service and professional growth combined with unwavering dedication to operating with the utmost of integrity is what allows him and his team to bring such value to their clients.

Sean remains very committed to Villanova University and the alumni association. Sean work with 1000's of advisors while at eMoney, in addition to his commitment to the several families and their businesses which he designed plans for has enabled him to continue his career with a dual-focus.

Sean resides in Bryn Mawr, PA with his wife Kaelin and their two young children Fiona and Henry. Sean remains extremely active in his community, giving his time to the Special Olympics and the Philadelphia Chapter for ALS.

Jon Perkins

AVP, Institutional Business Development



Mr. Perkins serves as an AVP of Business Development for Envestnet. Within this role at Envestnet, he supports the firm's institutional sales initiatives. In particular, Mr. Perkins focuses the majority of his efforts on prospecting new institutional clients (Banks, Broker/Dealers, Trust Companies & large RIA's) as well as providing support and advice to current clients.

Before his current role, Jon worked as an Associate Regional Consultant in the RIA marketplace covering the North Atlantic, Mid Atlantic, and Midwest territories. Prior to entering the RIA space, he had been focused on providing dedicated support to our high net worth advisors as an associate with our Signature Services team, ensuring quality day to day support in all things Envestnet. Having joined the organization in 2012 as an Operations Specialist within our Managed Accounts Service team in Envestnet's Chicago office, Jon brings unique ground-up client support experience to the team.

Jon holds a Bachelors of Business Administration in Economics with minors in Finance and English from Loyola University Chicago and his Series 7 securities license.

**Dan Jones**

AVP, Institutional Business Development

Mr. Jones serves as an AVP of Business Development for Envestnet. Within this role at Envestnet, he supports the firm's Institutional sales initiatives. In particular, Mr. Jones focuses the majority of his efforts on prospecting new institutional clients (Banks, Broker/Dealers, Trust Companies & large RIA's) as well as providing support and advice to current clients.

Before his current role, Dan worked as an Internal Regional Consultant and an Associate Regional Consultant at Envestnet. Prior to being acquired by Envestnet in 2010, he worked in Sales as well as an Analyst for Prima Capital. Before joining Prima Capital he was employed as a Senior Operations Analyst with Clayton Fixed Income Services in Denver, Colorado where he was responsible for providing reporting and analysis on a number of agency-issued Mortgage Backed Securities.

Mr. Jones received his Bachelor's Degree in Economics from Southern Illinois University with a minor in Speech Communication. Additionally, he holds a Series 65 Investment Advisor registration.

**Sophie Fitzpatrick**

Associate, Institutional Business Development

Sophie Fitzpatrick engages with new opportunities with Independent, Regional, Bank, and Insurance Broker/Dealers, as well as Registered Investment Advisor firms. Throughout the discovery process, she will provide support in order to design an effective and efficient solution for prospective clients. She works closely with the various functional teams at Envestnet to ensure the best solution for each firm is being offered.

Before starting full-time in July, 2016, Sophie served as an intern within the Institutional Business Development team for two years.

Sophie earned her Bachelor's Degree in Political Science from Trinity College in Hartford, Connecticut.