
Katie R. Bonner

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Dynamic and energetic communicator with over fifteen years of strategy, relationship building, leadership, culture development, and financial services experience concentrated around product distribution, human resources, health insurance, relationship/vendor management, financial analysis, customer service, and forecasting across a range of industries, including insurance, retail services, banking channels, 401k/pension, and individual products and services

PROFESSIONAL EXPERIENCE

UnitedHealthcare

Marketing Director – Community & State

August 2015 - Present

- Execute and design strategic initiatives for state wide sales and retention
- Develop annual marketing plan, business plan, and business reviews
- Initiate relationships and engage Community Stakeholders statewide
- Develop and build brand awareness in the State of Iowa
- Co-chair and lead Member Stakeholder Advisory Committee
- Oversight and development of all member materials
- Introduce and implement social media strategy to Iowa market
- Manage Value Add benefits for the state
- Lead, mentor, and develop marketing team
- Drive strategic budget and cost initiatives
- Implement and develop culture for all employees in Iowa

Principal Financial Group

Benefit Program Manager – HR Benefits

January 2014 – August 2015

- Drove strategic initiatives for benefits through various conduits of communication
- Managed strategic relationships, internally and externally
- Developed and built oversight of benefit programs
- Designed and implemented future benefit programs
- Lead benefit projects for Mergers and Acquisitions
- Collaborated with strategic partners across the company
- Implemented and facilitated first Vendor Summit
- Collaborated across HR and multiple business units to calculate Proxy/Board
- Cultivated Talent Management solutions for Voice of the Young Consumer at PFG in 2014

Principal Financial Group

September 2008 – December 2013

Internal Wholesaler –Annuities and Mutual Funds

- Wholesaled annuity and mutual fund products to existing and prospective reps in assigned territory
- Developed and managed territory while maintaining excellent relationships with new and existing reps
- Presented sales materials to executives, individuals, and groups
- Built and developed monthly marketing campaigns targeting Advisors and clients
- Achieved monthly sales goals of 20MM, yearly goal of 240MM
- Strategized and consulted with various areas of the company reaching across business lines
- Collaborated, co-chair trinket committee, fun committee

Principal Financial Group

September 2006 –September 2008

Senior Client Service Associate

- Managed 400MM in 401k assets for multiple companies nation wide
- Partnered with CEOs, CFOs, VPs and high level executives
- Maintained relationships with brokers and account executives on every plan
- Marketed various financial products and informed clients of all legislative changes
- Gathered data specific to market segments and clients for quarterly business updates
- Implemented new plans and new plans to Principal

Vanity Fair – Alpharetta, GA

February 2005-September 2006

Account Specialist

- Oversight of production dates coupling internal merchandise and production calendar
- Collaborated with cross functional teams to drive production and managed process
- Analyzed four different Vanity Fair brand accounts
- Managed shipping, receipts, forecasts, and calendars weekly, monthly, and annually

Wells Fargo Financial – Des Moines, IA

June 2004-January 2005

Credit Manager

- Analyzed customer loan portfolios comprised of tax and budget documents
- Underwrote secured and unsecured loans
- Analyzed credit bureaus while determining credit worthiness
- Sold refinances of mortgages, consolidation loans, unsecured loans and credit cards

Auditor of State of Ohio – Dayton, OH

June 2003-August 2003

Internship

- Partnered with public officials to perform audit research
- Analyzed documents and applied specialized software for each particular audit section
- Managed and maintained client confidentiality while performing various audit programs
- Completed audit section within the specified time allocated

EDUCATION

Masters of Business Administration
Liberty University, Lynchburg, Virginia
May 2018

Bachelor of Arts – Major: Accounting and Finance, Minor: Bible
Cedarville University, Cedarville, Ohio

