

SUMMARY

Over 30 years of increasing responsibilities involving institutional management of client assets. Developed outstanding skills in sales and marketing to various target groups, including CEO's, CFO's and Boards of Trustee. Currently owner and manager of Kiai Communications LLC, an independent consulting firm specializing in helping family owned small businesses increase wallet share from existing clients and obtain new customers, productions and promotions along with GPS tracking equipment installation for corporate fleets.

EXPERIENCE

Morgan Stanley Inc. Middleton, MA 1994-2011
Senior Consultant ICS (Institutional Consulting Services), First Vice President & Assistant Branch Manager

Retired at age 55 as Senior Investment Advisor for Morgan Stanley's North Shore location in Middleton Ma. Financial Advisor to over 250 client accounts, including families, professionals, corporations and retirement trusts with total assets under management and supervision in excess of \$100 million. Concentrating on private institutional portfolios and utilizing internal and external resources to select and monitor appropriate money managers, while helping clients to enhance returns, control risks and generally simplify the investment process.

Shearson Lehman Brothers Inc. Boston, MA 1988-1994
First Vice President

Financial consultant within the Consulting Services Division excelling in analysis of client investment objectives, defining risk/reward parameters and asset allocation techniques. Outstanding analytical capabilities using Modern Portfolio Theory in the screening of proper independent asset management firms and measuring on-going performance parameters for NYSE listed corporations with sales ranging up to \$300 million, corporate owners with sales up to \$50 million, ERISA retirement plans (including 401(k)), Taft-Hartley plans, high net worth individuals.

Merrill Lynch & Co. Boston, MA 1981-1988
First Vice President

Top ranked producing investment broker within the Northeast Region. Specializing in direct marketing to affluent investors. Rewarded as the youngest employee (age 27) to obtain Vice President status in Greater Boston area. Designed cost effective and tax efficient asset management programs for corporate treasurers with responsibility for corporate cash management and pension/profit sharing plan assets. Interfaced with outside attorneys and CPA's concerning issues of taxation and account structure on behalf of clients and trustees.

Fidelity Management & Research Co. Boston, MA 1979-1981
Regional Sales Representative

Marketed cash management, retirement benefit and various mutual fund programs to institutional investors. Implemented innovative sales and marketing campaigns to attract new clients. Recognized as highly successful in securing and maintaining many new institutional client accounts.

Unisys Corporation Boston, MA 1978-1979
Massachusetts Financial Large Accounts Branch
Financial Accounts Sales Representative
Marketed mini-computer systems, data communications equipment and associated software to commercial banks. Responsible for all sales of equipment and service concerning named accounts. Coordinated the installation and service of equipment among field engineers & bank personnel.

EDUCATION

MBA Babson College Wellesley, MA 1986
International Finance and Business Law
Concentration

BSBA Boston University Boston, MA 1978
Major in Finance & Investments, Minor in
Marketing & Sales

References available upon request from prior clients and from outside contacts within an extensive network throughout the US and Canada.

DOMENIC A. KALIL

103 Lancaster Road
North Andover, MA 01845
kalilfamily@comcast.net
617-974-0818

