

**TOWN OF WILTON
BOARD OF SELECTMEN**

**BOARDS AND COMMISSIONS
CANDIDATE SUBMISSION BY A POLITICAL PARTY**

Please fill out the following for each candidate being endorsed for a Board or Commission appointment. This application plus additional materials should be emailed to Jackie Rochester in the First Selectman's Office. Please note each candidate must also complete a Candidate Application

Board or Commission: Economic Development Commission

Candidate: Alison Smith

Number of applicants interviewed for the position: 1

Reasons for recommending this candidate:

Alison is a strong candidate for the EDC because she brings three strong areas of focus to the commission. Alison and her husband chose to raise their children in Wilton and they have lived here for 10-years, she is the owner of a small business that she recently moved to Wilton from the mid-west, and she is a Vice President for a financial firm. Her small business, financial, and family orientation allow Alison a unique view on the future direction of the town and the work of the economic development.

The Democratic Nominating Committee strongly recommends Alison for membership on the Economic Development Commission.

**TOWN OF WILTON
BOARD OF SELECTMEN**

**BOARDS AND COMMISSIONS
CANDIDATE APPLICATION**

All candidates who wish to be considered for appointment to a non-elected Board or Commission or appointed to a vacancy on an elected Board filled by the BOS must complete this application. Where appropriate, candidates may choose to reference an attached resume, containing the required information.

Board or Commission: Economic Development Commission

Candidate: Alison Smith

Contact information: alisonsmithnyct@gmail.com; 516-779-5879

Political Affiliation: Democrat

Addresses for the last 10 years: 45 Quail Ridge Road Wilton CT 06897; prior was 106 Blueridge Road Fairfield CT 06825

Employment history for the last 10 or more years: The Principal Financial Group 1155 Avenue of the Americas New York NY 11073; Co-Owner of Wilton Field Club DBA WildBloom Skincare 15 Hubbard Road #54 Wilton CT 06897

Post high school degrees and certifications: Bachelor's of Business Administration in Finance from James Madison University, Master's in Risk Management and Insurance from Florida State University, Master's of Business Administration from Florida State University, Certificate of Business Law from Cornell University

Wilton town or community volunteer positions for the last 10 or more years: Leader of Daisy Girl Scout Troop, Wilton CT, Junior League of Easter Fairfield County Development Board Member

Please attach a statement including, at a minimum why you are seeking the appointment and your qualifications for the appointment.

As a small business owner in Wilton and a town resident, I am very interested and engaged in the financial success of the town. By bringing more successful businesses and business opportunities to town, we create more demand for real estate, more visibility for our schools and more engagement in our immediate community. I have been an institutional retirement strategy consultant with The Principal Financial Group for over 20 years, have a real estate investment business, am co-owner in WildBloom Skincare operating out of Wilton so have a

strong business and financial background. I just joined the board of the Westport Country Playhouse and am a sponsor of MOCA in Westport so also bring symbiotic ties to other communities that could strengthen our position through regional partnerships. I also have experienced through the years what a strong interpersonal community that we have and look forward being part of translating that engagement to business development in the community.



Alison K. Smith

MSM, MBA, CRPS®

Ph: (516) 779-5879

alisonsmithnyct@gmail.com

Alison joined the Principal Financial Group in 2001. She leads the New York Regional office for Principal that services over 3,000 clients. Through consultative partnership with local financial advisory firms and consultants, she works to deliver Principal's mid- and large-plan retirement strategies to current and future clients throughout the area.

Alison holds a Bachelor's in Business Administration from James Madison University, a Master's in Science Management Degree with a focus in Executive Benefits and Risk Management and a Master's of Business Administration from Florida State University. She is a Chartered Retirement Plans SpecialistSM and has served as an expert textbook reviewer for LOMA on the subjects of ESOP and other qualified retirement plans. She is also the recipient of a C(k)P® designation through TRAU at The University of Southern California.

Alison speaks locally on various qualified plan subjects for both for profit and not for profit organizations.

Separately from her Principal employment, she is a co-owner and founder of WildBloom Skincare, a national all-natural, net-zero plastic and sustainable skincare and beauty solutions company based in Wilton, CT. She has also written two books in The Celebration Series, which is a children's book series focused on world religions and similarities that tie communities together.

Alison is an active member in her local community as the leader of Daisy Troop 50373, a member of the Wilton League of Women Voters and is a corporate sponsor of MoCA in Westport CT.

She lives in Wilton with her husband, Mark, and three children Bennett (12), Emily (10) and Harper (5).

Alison is Life and Health Insurance licensed in New York, New Jersey, and Connecticut. She also has FINRA Series 7, 63, 24 and 65 registrations.

ALISON SMITH

45 Quail Ridge Road, Wilton CT 06897 ** 516-779-5879

alisonsmithnyct@gmail.com · [LinkedIn Profile](#)

· [Twitter @AlisonSmithNYCT](#)

EXPERIENCE

THE PRINCIPAL FINANCIAL GROUP

- Highest Production award winner (Classice Qualifier) 17 of 19 years
- 2017 Impact player of the year award for all of Retirement and investor services; award given to a single employee of all client-facing services for greatest impact to the success of the organization in the year

MARCH 2014-PRESENT; NEW YORK CITY MARKET

VICE PRESIDENT, RETIREMENT SERVICES

- Currently manages the largest retirement distribution team at The Principal
- Supervising Registered Representative for largest retirement distribution team at The Principal
- Largest pure revenue producer for all of retirement distribution
- Consolidated/reduced number of employees while maintaining and expanding production
- 100% of team met corporate designation goals in 2018
- Sales responsibilities for Defined Contribution, Defined Benefit, ESOP and Non-Qualified consolidated retirement strategies at all market sizes.
- Cover advisor and consultants in entire region of NJ, NY and CT

MAY 2006-MAY 2010; NEW YORK CITY MARKET

DIRECTOR OF SALES, RETIREMENT SERVICES

- Managed team of 4 senior sales representatives including SRR responsibilities
- Responsible for all regional marketing strategy
- Led all sales team meetings for entire region
- Achieved top producer status all years in titled role.
- Sales responsibilities for Defined Contribution, Defined Benefit, ESOP and Non-Qualified consolidated retirement strategies at all market sizes.
- Cover advisor and consultants in Long Island, New York City and Fairfield County, CT.

MARCH 2004-MAY 2006; TRANSITIONED FROM WASHINGTON DC TO NYC AUGUST 2004

SENIOR SALES REPRESENTATIVE, RETIREMENT SERVICES

- Top of Classic category
- Transitioned to rebuild Long Island Territory
- Sales responsibilities for Defined Contribution, Defined Benefit, ESOP and Non-Qualified consolidated retirement strategies at all market sizes.
- Cover advisor and consultants in Long Island, NY

MAY 2001-MARCH 2004; WASHINGTON, DC MARKET

ASSOCIATE SALES REPRESENTATIVE, RETIREMENT SERVICES

- Trained and shadowed senior sales and management representatives
- Planned regional marketing events
- Achieved goal of plan count first year in sales
- Sales responsibilities for Defined Contribution, Defined Benefit, ESOP and Non-Qualified consolidated retirement strategies for plans under \$1m.
- Cover advisor and consultants in West Virginia, Virginia and Maryland.

AMERICAN EXPRESS FINANCIAL ADVISORS

1998-2001; HARRISONBURG, VA MARKET

ASSOCIATE FINANCIAL ADVISOR

- Sourced market opportunity leads for senior financial advisors
- Cold-called for financial planning clients in Virginia and Maryland

EDUCATION

MAY 2006

MASTER'S OF BUSINESS ADMINISTRATION, FLORIDA STATE UNIVERSITY

MAY 2004

MASTER'S OF SCIENCE MANAGEMENT, FLORIDA STATE UNIVERSITY

Focus in Risk Management as it relates to cost reduction, talent retention and reward programs, business management structure and organizational planning.

MAY 2001

BACHELOR'S OF BUSINESS ADMINISTRATION, JAMES MADISON UNIVERSITY

Bachelor of Finance and Economics; Graduated in 3 years.

COMPLIMENTARY EXPERIENCE

JANUARY 2019-PRESENT

BOARD MEMBER, WILTON FIELD CLUB

Oversight of start up business operations including supplier relations, marketing strategy and distribution/sales strategy. Company is a lifestyle brand for natural health and beauty products.

MARCH 2010-PRESENT

AUTHOR, THE CELEBRATION SERIES OF BOOKS

Author of educational books for children.

SEPTEMBER 2016-JANUARY 2018

BOARD MEMBER, THE JUNIOR LEAGUE OF EASTERN FAIRFIELD COUNTY

Strategy for not-for-profit organization serving Fairfield County Connecticut; Director of community service outreach.

2011-2014

BOARD MEMEBER, FAIRFIELD RED, LLC

Strategy for franchise ownership of Tasti-D Lite Restaurants; successful start and sale of business operations and real estate.

SUMMER 2005

TEXT REVIEWER, LOMA

Expert text book reviewer on the subject of ESOP Plans

DESIGNATIONS

- Series 7
- Series 65
- C(k)P
- Life and Health Licensed in NY, NJ, CT
- Series 24
- CRPS
- AIF

SKILLS

- Change Management
- Sales Growth and Team Management
- Negotiation and Art of the Deal proficiency
- Presentation training for sales and service retirement professionals
- Operational Efficiencies
- Sales Force Utilization
- Expense Analysis