

David Smith

SENIOR MARKETING & CREATIVE PROFESSIONAL

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SUMMARY

Versatile marketing leader with three decades in insurance and financial technology, working hands-on across brand, design, web, video, email, and events. Adept at operating within marketing teams of any size and partnering closely with sales, product, and engineering to bring campaigns and creative to life — pairing deep cross-disciplinary range with fluent, current AI-assisted production.

- Drove a ~30% increase in leads through a targeted, large-scale email campaign.
- Rebuilt dormant marketing operations from a near-zero baseline, increasing leads and site traffic ~25%.
- Led branding and creative for 40+ corporate events and industry conferences.
- Pioneered a company's first online presence and earliest streaming and tutorial media.

AREAS OF EXPERTISE

Multi-Channel Campaign Strategy • Marketing Automation • Brand & Identity Development • Experiential & Event Marketing • Responsive HTML Email Design • AI-Assisted Content Production • UX Design & Prototyping • B2B & B2C Marketing

CORE SKILLS & TOOLS

Campaign Platforms: Klaviyo, Pardot, HubSpot, Mailchimp

Creative & Design: Figma, Photoshop, InDesign, Illustrator, Premiere

Marketing & Production: Email Marketing, Marketing Automation, Trade Show & Events, Landing Page Design, HTML Email, Brand Development, Social Media

AI & Workflow: Claude, ChatGPT

PROFESSIONAL EXPERIENCE

Senior Marketing Officer / Brand & Creative Lead **2025 – 2026**
Ebix, Inc.

An insurance technology provider specializing in risk management and compliance software, including certificate-of-insurance tracking and enterprise risk solutions.

- Rebuilt and modernized dormant marketing operations for the Ebix Risk and RCS (Risk Compliance Solutions) divisions during a major restructuring, reestablishing branding, campaigns, and content strategy.
- Partnered with sales teams to produce 10 thought leadership pieces and 6 customer case studies, designing the supporting email and LinkedIn campaign graphics and expanding the divisional website — increasing leads and site traffic by approximately 25% from a near-zero baseline.
- Collaborated with the Health division's brand manager to develop its website, brochures, email marketing, and LinkedIn presence, aligning creative and messaging across the division.
- Led trade show marketing end-to-end, expanding it beyond booth design and on-site collateral to add LinkedIn pre-show campaigns and a direct mail program for the divisions' largest annual show, Riskworld — while managing most event logistics directly.
- Served as creative lead for the EbixEnterprise relaunch, taking over and refining the new website in Figma, building campaign landing pages, and producing the launch infographic, collateral, HTML emails, and LinkedIn graphics.
- Integrated AI tools into creative and content workflows — using ChatGPT to accelerate case study, thought leadership, and email content, and Claude for design ideation and to produce landing page builds for developer handoff.

PROFESSIONAL EXPERIENCE CONTINUED**Marketing Automation Specialist****2025 – 2026***Near&Dear (formerly Moontide) · Freelance*

A full-service marketing and media agency serving national brands across health, automotive, and consumer products.

- Managed B2B (Pardot) and B2C (Klaviyo) email marketing for Moontide client *Sente Labs*, building automated workflows and campaign deployments that increased open rates and engagement by approximately 20%.
- Redesigned email templates from image-based layouts to responsive HTML, improving deliverability and engagement.
- Partnered with development and project teams to build advanced abandoned-cart and behavioral-trigger campaigns.

Senior Creative Designer & Marketing Coordinator**2024***Zinnia*

An insurance technology company providing a modern platform for the life and annuity industry, streamlining how products are built, sold, and serviced. Joined following Zinnia's acquisition of Ebix's Life & Annuity division.

- Relaunched email marketing for the acquired Life & Annuity division in HubSpot to reconnect with clients during the post-acquisition transition, and partnered with sales to redesign 6 product brochures across the division's portfolio.
- Designed trade show booths and LinkedIn event promotion to reestablish the Life & Annuity brand presence at conferences.
- Drove an email campaign to a ~200,000-contact list promoting weekly sales webinars and demos — managing new-domain warm-up for deliverability and lifting leads by approximately 30%.

Art Director & Senior Marketing Officer**2009 – 2024***Ebix, Inc.*

An insurance technology provider; the Life & Annuity division delivered end-to-end software for financial advisors and agencies, spanning product comparison, underwriting submission, and policy activation.

- Stepped into the lead creative role following the acquisition, redesigning the division's full collateral suite, refreshing brand messaging, designing trade show booths, and partnering with developers to modernize the web presence.
- Led branding and creative for 40+ corporate events and industry conferences, partnering with the events team on theme and all creative deliverables.
- Drove email marketing campaigns for the SmartOffice CRM, targeting retail financial advisors as an entry point to larger enterprise broker-dealer accounts.
- Led the UX redesign of the SmartOffice CRM platform, wireframing the overhaul and coordinating rollout with development and product teams.

Director of Multimedia**1994 – 2009***E-Z Data, Inc.*

A financial services software company providing a web-based CRM platform for financial advisors and insurance agencies to manage clients, products, and correspondence.

- Built the company's first web presence and led its move into interactive media, producing animated product presentations, streaming tutorials, and email marketing in collaboration with sales and development.
- Grew from customer service and sales into leadership of the company's multimedia and digital content.

EDUCATION**Bachelor of Liberal Arts & Sciences***University of Kansas***Graphic Design Studies***Art Center College of Design***Graphic Design Studies***Pasadena City College*