



## Courtney E. Munoz

*Senior Vice President, Strategic Initiatives*

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Courtney Munoz joined U.S. Retirement & Benefits Partners in June 2018 as Western Divisional Senior Vice President, and assumed the role of Senior Vice President of Strategic Initiatives in January 2020. In her role she is responsible for sales enablement and operations and execution of critical business initiatives.

Throughout her executive career, Courtney has held leadership positions with organizations including Ameriprise Financial and MassMutual Financial Group. After joining MassMutual in 2005, Courtney quickly ascended to become Regional Vice President managing a region of 12 agencies and 400 advisors across 10 states. In that position she was responsible for the overall sales and recruiting results of the organization, and she consulted with General Agents and Managing Partners on organizational design, compensation, sales training, leadership development, and real estate and financial management. Courtney also led MassMutual's business transformation in response to fiduciary rule regulations. As part of the \$25M project, Courtney led multiple project teams implementing new technology, business policies, operational procedures, and training for MassMutual's 9,000+ advisors.

Courtney began her career as a financial advisor and manager, consulting with individuals and small businesses on retirement planning, employee benefits, insurance, and investments. She is a registered representative and principal with FINRA Series 7 and 24 exams, and in 2006 earned her Certified Financial Planner designation.

In 2018 Courtney was selected as a Women's Executive Leadership Fellow through The Impact Center in Washington, D.C. The Impact Center is a premier leadership development organization for high-impact individuals and institutions. This highly selective yearlong program accelerates leadership growth for executives. Courtney has also volunteered with SCORE, a national nonprofit organization of current and retired executives, volunteering time to mentor small business owners and entrepreneurs.

Courtney obtained her Bachelor of Science in Industrial Economics with minors in Mathematics and Japanese from Union College. She received her Master of Business Administration from the University of Connecticut. She resides with her husband and two children in Maine.