

JOFI BALDRICH

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Business executive with significant leadership experience including team leadership, business development, strategic planning, managing client relationships, and negotiating joint ventures. A strong record of achievement includes developing and reengineering projects and companies while building sales, market share and profit, and adding significant value in marketing, operations and finance functions. Outstanding record as a civic-minded, socially responsible professional consistently able to access and build relationships with top decisionmakers in business, government and industry, both nationally and internationally.

Results-driven Leader: Skilled at developing and managing high-performance teams.

- Built, energized and led a team of 25 that more than doubled its contribution to the bottom line, year over year.
- Hired, trained and mentored numerous individuals who went on to tremendous career success.
- Led sales and operational teams by example, created an energized and vitalized work environment, and inspired excellence and a collaborative focus – the team strength produced continued organizational momentum.
- Direct contributor to the development and growth of the Young Presidents' Organization (YPO) in Puerto Rico.

Business Strategist: Adept at analyzing competition, creating and executing effective plans and cultivating momentum markets.

- Commissioned by CEO of \$100 million company to develop expansion strategy. Morphed the business into one that integrates complementary products and services to capitalize on the core client base.
- Identified potential synergies – in terms of people, processes, products, service and IT – to spike growth and deliver 40% increase in revenue.
- Took advantage of the rapidly changing insurance market to create competitive pricing/marketing model that increased penetration within all major financial institutions in Puerto Rico.
- Successfully launched several new products and services, capturing 100% of targeted market and contributing \$8 million in sales.

Project Management: Recognized for flexibility, integrity, vision, innovation, leadership skills and the ability to complete challenging projects in local, national and international arenas.

- Lead the negotiations and initiated partnership with global insurance giant, establishing Monumental General Life Insurance Company in Puerto Rico.
- Triumphed over multicultural differences, easing tension with respect and humor, in various positions with the Puerto Rico Tennis Federation in its involvement with the International Tennis Federation, the United Tennis Association and the Puerto Rico Olympic Committee.

PROFESSIONAL EXPERIENCE

Coach-Speaker-Author and YPO/WPO Certified Forum Facilitator, San Juan, PR

2009-present

A Certified Integral Coach® with a certificate in Positive Psychology and YPO/WPO Certified Forum Facilitator (certified in 2012), offering coaching services and speaking around the world, often with the Young Presidents' Organization (YPO). Author of *Unwritten: A Story of Discovering How to Live a Happier, More Meaningful Life*, a journey to find answers to the vital questions in our lives. Specializing in coaching teens and young adults to discover their individuality and choose the path that's true for them. Also guiding successful adults to find purpose and meaning to answer life's nagging questions, such as "What's Next? What's missing?" The goal is for the entire family to achieve harmony and be truly, authentically happy.

President and Executive Vice President, Baldrich & Associates, Inc., San Juan, PR

1995-2006

Assumed key stewardship for family-owned property, life and specialty insurance business. Developed strategic positioning for continued growth and profitability of the company. Set strategic and operational goals and objectives. Oversaw

development of operating plans and budgets. Directed a multidisciplinary team of upper-level executives in day-to-day management.

- Was the primary force behind expanding product and service lines, including directing negotiations with C-level executives at leading U.S. and international firms. Spearheaded launch of new products and new revenue streams.
- Supervised and mentored department heads and managers in sales, claims, accounting, finance, marketing, and compliance departments; directed a staff of 120 members.
- Directed the conception and design of sophisticated IT systems to manage underwriting, policy issuance and claims processes, taking the company to the forefront of technology in the insurance business.
- Leveraged expertise in the insurance industry by serving as business consultant and trainer for financial institutions entering the insurance sales market.
- Led the development of two umbrella companies – Profit Solutions, Inc. and Auto Guard, Inc. – to advance positioning in the automotive market, gaining competitive advantage through the sale of VIN-etching and extended warranty services.

VOLUNTEER ENGAGEMENTS

Young Presidents' Organization, San Juan, PR

2003-present

Chapter level: Chapter Chair, Forum Chair, Family & Youth Officer, other Board positions

Regional level: Caribbean Area Chair, Family & Youth Chair

International level:

- Family & Youth YPO International Committee Member
- Denver GLC Host City Committee Member
- Singapore GLC Family & Youth Workshop Chair
- Istanbul GLC Assistant Education Officer Workshop Chair

Puerto Rico Tennis Association, San Juan, PR

1992-2004

Held several board positions, including representative at the International Tennis Federation and the Puerto Rico Olympic Committee

- Coach for Pan American Games in Cuba
- Delegate for Central American Games in El Salvador
- Coach and Delegate for the Olympics in Greece

Teresa Toda Home, Río Grande, PR

2003-present

Contributor and fundraiser for the Teresa Toda Home, a home and safe haven for abandoned girls.

Fundación Padre Juan José Santiago, San Juan, PR

2010-present

Cofounder, board member and contributor for this foundation, which provides scholarships that enable underprivileged, high-achieving students to attend private high schools in order to further their education and opportunities.

EDUCATION & CERTIFICATIONS

Holds a certificate in Positive Psychology, Wholebeing Institute, Stockbridge, MA

2012

Certified as an Integral Coach®, New Ventures West, San Francisco, CA

2010

MBA – Insurance and Finance, The College of Insurance, New York, NY

1992

BS – Business and Finance, Mount Saint Mary's College, Emmitsburg, MD

1989