

## **Hearts & Wallets Hires Betsy Seeley as Subject Matter Expert for Growing Inside Advice™ Business Line**

*Inside Advice™ Enhances Advice and Guidance Experiences with Benchmarking, Best Practices, Custom Consultations*

(Rye, NY) – Hearts & Wallets LLC is pleased to announce the appointment of Betsy Seeley as subject matter expert for Inside Advice™, the benchmarking of advice and guidance experiences, a growing business line for Hearts & Wallets, the preeminent platform of consumer data and insights for the savings, investment and financial advice industries.

“Advice and guidance plays an increasingly important role within financial firms to grow their business and engage consumers,” Laura Varas, chief executive officer and founder of Heart & Wallets, said. “Hearts & Wallets has worked hard in partnership with our clients over the years to create an objective assessment methodology to help firms enhance their experiences and understand the consumer. Betsy brings a wealth of financial services expertise, technical data expertise, hands-on experience in customer service management, and a wonderful track record in product delivery improvement and execution to take this research to the next level as we define the future for advice and guidance for our clients.”

At Hearts & Wallets, Seeley manages Inside Advice™ data collection and analysis, authors reports, and integrates consumer insights. As part of Inside Advice™ client support, Betsy creates confidential custom briefings, conducts benchmarkings and identifies best practices. She partners with the Hearts & Wallets tech team to develop and launch external and internal Inside Advice™ tools.

Seeley has over 25 years of experience in retail and institutional financial services as an executive, managing customer service, advice and guidance teams, including platforms, product delivery improvement and execution. She has extensive experience in customer satisfaction and retention, and process redesign for scale and revenue growth. Prior to joining Hearts & Wallets, Seeley served as a business consultant with the Retirement Services and Financial Planning area for Voya Retirement where she designed and built call tracking and interim CRM databases for a holistic advice and financial planning application. Earlier, Seeley served as managing director of Shared Services and before that as director of Advice and Financial Planning for TIAA.

-more-

## Seeley hire/2

At TIAA, Seeley led advice delivery, financial planning and managed account teams to develop objective advice, coached advisors on advice delivery and was a key contributor to an annual sales increase of over 30 percent over four years. She worked closely with mass affluent and wealth management advisors to position advice solutions to meet customer goals at TIAA and guided the retirement advice delivery strategy for a new wealth management business to shift the company toward a “customer-needs focused” approach.

At startup athenahealth, Seeley served as senior vice president of Service Delivery where she led large-scale innovative changes across multiple operating functions with the creation of a service and operations platform. Prior to that, Seeley served in a number of executive positions at financial services firms, including senior vice president of technology initiatives for Scudder Investments/Deutsche Asset Management; senior managing director of Operations and managing director of Investor Services for EquiServe; senior vice president and vice president of Customer Service for US Bancorp; and vice president of corporate and cardholder customer service for Citicorp Diners Club.

“Advice and guidance is at a transformative point within financial services with the commoditization of investment products, the advent of ‘robo-advisors,’ and the continuing challenge of consumer trust,” Seeley said. “Hearts & Wallets provides an unparalleled capability for clients to see advice and guidance through the eyes of the consumer and enhance the value proposition of their experiences through objective data. I’m so pleased to be a partner in this important work to lift up both our clients and consumers.”

A resident of Wellesley, MA, Seeley graduated cum laude with a bachelor’s degree in English Literature from Middlebury College. She holds a master’s of business administration from Harvard Business School. Seeley is also a Certified Scrum Product Owner®.

## About Hearts & Wallets

Hearts & Wallets is a data and consulting firm focused on understanding the drivers behind retail investor decision making. Combining a consumer marketing framework with financial services operating experience, the company’s mission is to be a catalyst for consumer-driven innovation in retail investing and saving. Hearts & Wallets works with leading financial providers to improve the effectiveness of their marketing communications, solution design and service delivery. For more information visit [www.heartsandwallets.com](http://www.heartsandwallets.com).

## Media Contact

Lynn Walters [lynn@heartsandwallets.com](mailto:lynn@heartsandwallets.com)  
800-930-0966 ext. 704

## Hearts & Wallets, CEO & Founder

Laura Varas [laura@heartsandwallets.com](mailto:laura@heartsandwallets.com)  
800-930-0966 ext. 700

###