



Ani Yessaillian, Principal and Founder

Ani Yessaillian is recognized as a leading business strategist for financial institutions and financial advisors seeking to accelerate profitable growth. She offers over 20 years of expertise in the areas of product development and marketing for wealth management, asset management, and brokerage firms serving high-net-worth investors, family offices, and registered investment advisors. As principal and founder of Excella, Ani is frequently relied upon by these institutions to develop strategies and programs focused on increasing sales of their investment, capital markets, and technology offerings.

In addition, Ani specializes in helping financial advisors grow and manage a thriving practice. She delivers actionable guidance for financial advisors in the areas of business planning, marketing, center-of-influence referrals, and client loyalty. Financial advisors across the United States have participated in programs developed by her firm.

Prior to the founding of Excella, Ani was a vice president with Fidelity Investments. At Fidelity, she held various marketing and product development positions in Fidelity Management & Research and Fidelity Personal Investments, as well as with the Fidelity Charitable Gift Fund, a donor-advised fund and public charity. During her nine-year tenure, she developed investment communications programs for institutional clients, created online programs in the financial planning arena, and launched strategic acquisition programs targeting ultra-high-net-worth investors. She also spearheaded several key initiatives that received national acclaim from *Barron's*, *Broker Monitor*, and syndicated financial columnist Chuck Jaffe.

Earlier in her career, Ani was a management consultant with PricewaterhouseCoopers and held positions in commercial lending at BankBoston. Ani earned a Masters in Business Administration degree, with honors, from Columbia University and is a graduate of Boston College where she earned her Bachelor of Science degree, cum laude.