

Chris Malmborg

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Business development leader in the wealth management and RIA space driving new business acquisition and revenue. Personally closed 40+ complex, multi-stakeholder deals representing over \$1.9B in verified AUM while generating \$6.6B+ in territory-wide results, earning two promotions in three years. Combines consultative sales experience with deep wealth management sector knowledge to navigate unique due diligence processes and multiple buying influences, consistently ranking in the top third of peers nationally.

Experience

LPL Financial

San Francisco, CA

AVP, Business Development – Northern California

Nov 2023 – Present

- Drives new business acquisition across Northern California, generating \$6.6B+ in assets under management (AUM) across 97 organically sourced clients and \$35.2M in annual revenue production
- Grew individual production 34% year-over-year, closing \$1.12B+ in AUM across 16 new business deals in 2025 after generating \$910M+ in AUM across 27 closed deals in 2024
- Ranked 9th of 28 sales representatives nationally and 9th of 28 territories in consecutive years
- Owned full sales cycle from initial contact through close across 40+ deals, growing largest deal from \$92M to \$160M in AUM while generating \$10.8M+ in primarily fee-based recurring revenue
- Guides clients through complex transitions encompassing business economics, compliance requirements, and long-term strategic planning, articulating the firm's unique value proposition throughout the sales cycle
- Integrates AI tools into prospecting and pipeline management workflows, leveraging AI-driven research and personalized outreach strategies to engage high-value prospects and accelerate deal velocity

Internal Regional Director – Pacific Northwest

May 2023 – Nov 2023

- Generated \$1.37B+ in qualified pipeline opportunities by booking 53 targeted outbound meetings, sourcing \$12.3B in AUM and \$51.4M in revenue across the Pacific Northwest
- Built pipeline that fueled the territory's \$4.45B Presidents Club qualification, partnering with the Regional Director to advance opportunities from sourcing through close

Business Development Associate

Aug 2022 – May 2023

- Set 198 meetings through high-volume cold outbound, sourcing ~\$14B+ in AUM, generating ~\$10B+ in pipeline opportunities that fueled multi-billion-dollar firm growth

Technical Projects

Newsletter Digest App – [[tldread.ai](#)] [[GitHub](#)]

Web application that consolidates a user's email newsletter subscriptions and uses AI to analyze trends and generate personalized daily digests tailored to interests.

Tech Stack: Built with Claude Code – JavaScript, Node.js, FastAPI, Gmail OAuth, Claude API, Railway

AI Strategy Game – [[Live Demo](#)] [[GitHub](#)]

Web-based number guessing game featuring AI-powered post-game strategy analysis that evaluates player decision-making and recommends improved approaches.

Tech Stack: Built with Claude Code – JavaScript, Claude API, Railway

Licenses, Education & Skills

Series 7 (General Securities Representative) | Series 66 (Uniform Combined State Law) | CA Life & Health Insurance
University of Southern California – Thornton School of Music – Bachelor of Science, Music Industry (May 2018)

Sales: Salesforce CRM, LinkedIn Sales Navigator, Microsoft Office Suite, Tableau, Loom

AI-Assisted Development: Claude Code, Claude API, JavaScript, Node.js, Python, FastAPI, Git/GitHub, Railway