

# JENNIFER ALLOCCO MORRIS

As a 3x venture-funded, 2x exit tech innovator and former C-level executive at a \$65 billion (assets) public bank, Jennifer brings more than 30 years of driving profitable growth through strategic initiatives and digital marketing across banking, mortgage, fintech, and insurance. Her combination of corporate discipline, entrepreneurial execution, and hands-on AI expertise provides a unique, modern, and multidisciplinary approach to business.

## BOARD & ADVISORY

GiftBar.com – Board Member  
Wintrust Financial Corp – ALCO  
El Valor – Advisor to President  
Holy Name Cathedral – Finance Committee

## EDUCATION

MBA FINANCE  
University of Chicago, GSB/Booth  
BS BUSINESS ADMINISTRATION  
University of Illinois Urbana

## OTHER



## CURRENT APPLIED AI EXPERIENCE

Jennifer is the CFP & Co-Founder of AskGen.com a modern AI Medicare platform driven by her passion to help senior citizens navigate the complexities of health insurance.

To complement this expertise, she has applied to MIT's prestigious AI for Senior Executives program, underscoring her belief that world-class education in AI should be a baseline requirement for board members charged with stewarding long-term corporate success

## PREVIOUS EXECUTIVE EXPERIENCE

Jennifer served as Executive Vice President and Chief Marketing Officer of Wintrust Financial Corporation (NASDAQ: WFTC), a \$63 billion financial institution. She is highly experienced in **crisis management** and led both internal and external communications, **under Board oversight**, to mitigate risk (as an Essential Service) during COVID, Black Lives Matter, the SVB banking crisis, and the Great Resignation.

At Wintrust, she played a key role on the executive leadership team, shaping strategy for **three acquisitions** and contributing to the successful **CEO succession** from the founder to his successor. Her responsibilities also extended to the **ALCO and Operating Committees**, where she influenced enterprise risk management, capital allocation, and long-range growth strategies.

Jennifer also brings direct board experience. **As a Board Member** at Giftbar, she oversaw the company's **capital raises**, growth, and ultimate exit, serving alongside a fellow director who is now the Global Head of Financial Institutions Group Investments Business at **BlackRock**

Earlier in her career, Jennifer combined strategic investment insight with **business transformation at PwC**, where she advised on complex M&A transactions for some of the nation's largest hospital systems. She later joined **Blue Cross Blue Shield Association**, where she played a key role in shaping the foundation of today's \$1B Blue Venture Fund, while also driving the Blue's international strategy and its expatriate partnership with Allianz and the Senior Market Affinity program.