

Vanilla appoints Jim Sinai as Chief Marketing Officer and Karen Nachbar as General Counsel

Vanilla announces the addition of key executives following a \$30m Series B investment to accelerate Vanilla's growth.

UNITED STATES, August 4, 2022 /EINPresswire.com/ -- Vanilla, the award-winning Estate Advisory Platform, designed to transform how wealth advisors help their clients manage their estate and build their legacy, announces the addition of Jim Sinai as Chief Marketing Officer and Karen Nachbar as General Counsel. Jim and Karen join following a [\\$30m Series B investment](#) led by Insight Partners to round out a [leadership team announced](#) earlier this year and accelerate Vanilla's growth.



Jim Sinai, CMO

As CMO, Sinai will lead the marketing function reporting to Gene Farrell, CEO.

Jim brings his extensive background in introducing new software products, launching brands, building demand, and growing marketing teams to Vanilla.

As General Counsel, Nachbar is responsible for Vanilla's legal, compliance, and risk matters, also reporting to CEO Gene Farrell. She acts as strategic advisor to the leadership team and Board of Directors and is responsible for providing counsel on corporate strategy, ethics and compliance, and privacy and data governance.

"Jim and Karen join us at an important time. Our mission is to empower everyone to create a meaningful legacy." said Gene Farrell, CEO. "Our platform helps advisors build deeper relationships with their clients through the process of helping them integrate their estate plan with their financial picture to optimize the impact on the people and causes they care about."

The addition of Jim and Karen will help us scale faster and continue to raise the bar on security, privacy, and compliance.”

“We built Vanilla to simplify estate planning for advisors and their clients. With Vanilla, advisors and clients work together in a collaborative platform to minimize their tax burden and maximize their legacy”, said Vanilla Chairman, Founder, and wealth advisor Steve Lockshin. “We are excited to welcome Jim and Karen to our growing team.”

With over a decade of enterprise software marketing experience, Sinai is joining Vanilla after almost 3 years as the Senior Vice President of Marketing at Procore Technologies, a construction software

company. At Procore he led global marketing where he helped the company scale from \$200m to almost \$500m in revenue including a successful IPO in 2021. Prior to Procore, Jim served in a variety of marketing leadership roles at Salesforce in various business units including Salesforce Einstein, Salesforce Platform, AppExchange, Data.com, and Salesforce Industries. Jim graduated with a BA from Brown University and holds an MBA from the Stanford Graduate School of Business.

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Our mission is to empower everyone to create a meaningful legacy. Jim and Karen join us at an important time.”

Gene Farrell, CEO

Nachbar brings 25 years’ experience providing legal counsel to technology businesses across industries. She previously held the role of General Counsel of Bark, Inc. where she oversaw legal affairs for the company. From 2017-2019, Karen served as Senior Vice President, Associate General Counsel and Compliance Counsel at

Sotheby’s, where she supported all aspects of technology, data, and privacy for the global fine arts auction house. She also served in legal roles at Scholastic, Houghton Mifflin Harcourt, and Morgan Stanley. Karen graduated with a JD with honors from The George Washington Law School and a BS from Cornell University.

About Vanilla

Vanilla is the Estate Advisory Platform, purpose-built to enable financial advisors to build deeper relationships with their clients and empower clients to build and protect their legacy. From robust and easy-to-understand visualizations of complex estates, detailed diagrams of how



Karen Nachbar, General Counsel

assets transfer to future generations, to ongoing estate monitoring, Vanilla is reinventing the estate planning experience, end-to-end. Learn more about Vanilla at <https://www.justvanilla.com/>.

Media inquiries: Please contact press@justvanilla.com

Media Inquiries
press@justvanilla.com
Vanilla

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