

RENÉE BAKER, DBA

Visiting Assistant Professor of Instruction | Zimmerman School of Advertising & Mass Communications | University of South Florida
Founder and Chief Executive Officer, The RBI Group
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Updated August 2026

ACADEMIC PROFILE

Educator, former Chief Marketing Officer, entrepreneur, author, and speaker whose teaching, research, and advisory work connect artificial intelligence, strategic communication, financial services, governance, persuasion, and trust. Brings senior executive leadership in financial services, more than a decade of university teaching across two institutions, and an applied research agenda focused on generative AI, algorithmic trust, regulated communication, economic agency, and responsible organizational transformation.

RESEARCH AND TEACHING INTERESTS

Generative AI in advertising and strategic communication; algorithmic trust; AI governance and responsible adoption; media planning and integrated marketing communication; brand and reputation strategy; regulated-industry communication; financial education and economic agency; leadership and professional development.

AI AND INNOVATION CAPABILITIES

AI and automation strategy; responsible AI adoption and governance; AI-enabled marketing and communication transformation; business-use-case identification and prioritization; human oversight, attribution, and algorithmic trust; cross-functional implementation; AI integration in advertising, media, and regulated industries; executive education and organizational readiness.

EDUCATION

Doctor of Business Administration

Wilmington University | New Castle, DE

- Dissertation: Behavioral Intentions of Wine Tourists in Southern New Jersey Using the Experience Economy Framework. ProQuest publication no. 10107116.

Master of Business Administration

Penn State University, Smeal College of Business | University Park, PA

Bachelor of Science, Finance

Rutgers University | New Brunswick, NJ

Executive Education, Securities Industry Institute

SIFMA and The Wharton School | Philadelphia, PA

2016-2018

ACADEMIC APPOINTMENTS

Visiting Assistant Professor of Instruction

Zimmerman School of Advertising & Mass Communications, University of South Florida | Tampa, FL

August 2026-present

- Teach advertising management, media planning, portfolio building, persuasion in digital media, and introduction to AI and media.
- Integrate AI-enabled strategy with attribution, copyright, governance, disclosure, and regulated-industry communication standards.
- Connect theory to practice through live-client briefs, executive presentations, structured critique, and career-readiness initiatives.

Adjunct Faculty

Zimmerman School of Advertising & Mass Communications, University of South Florida | Tampa, FL

August 2018-August 2026

Adjunct Professor of Marketing

Wilmington University, College of Business | New Castle, DE

August 2014-August 2017

- Taught undergraduate marketing courses while completing doctoral studies.

TEACHING EXPERIENCE

ADV 4710: Portfolio Building

Fall 2026-present

University of South Florida

- Portfolio strategy, professional positioning, case studies, résumés, LinkedIn profiles, websites, and evidence-based career narratives.

ADV 4600: Advertising Management

Fall 2018-present

University of South Florida

- Strategic management of advertising and integrated marketing communication through live community-partner capstones, audience analysis, channel allocation, creative strategy, and final presentations.

ADV 3300: Media Planning for Advertising

Fall 2023-present

University of South Florida

- Media planning fundamentals through budget-constrained assignments, audience analysis, scenario modeling, platform economics, walled gardens, and the emerging model layer.

Additional Spring 2027 Courses

Spring 2027

University of South Florida

- PUR 4412: Persuasion in Digital Media.
- Introduction to AI and Media.

Marketing Faculty

2014-2017

Wilmington University

- BMK 305 Marketing; BMK 471 Mobile and Digital Marketing; BMK 413 Marketing Management; BMK 400 Social Media Marketing.

TEACHING EFFECTIVENESS AND CURRICULUM INNOVATION

- Taught approximately 600 Zimmerman School students through 2026, with more than a decade of university-level teaching across two institutions.
- Fall 2025 overall instructor rating of 4.81 across 73 students; Spring 2025, 4.52 across 80 students; Fall 2024, 4.68 across 74 students.
- Designed the Zimmerman Student Talent Book initiative to connect students with internships and post-graduation opportunities.
- Co-facilitated a USF faculty workshop on responsible AI integration.
- Use live-client projects, constrained budgets, executive presentation standards, and iterative feedback to build professional judgment and employability.

RESEARCH AND PUBLISHED WORK

Abundance Unleashed: Redefining Wealth & Success

2026

Manuscripts Press | ISBN 979-8-88926-888-8

- Available in print and audiobook formats.

Behavioral Intentions of Wine Tourists in Southern New Jersey Using the Experience Economy Framework

2016

Doctoral dissertation, Wilmington University | ProQuest 10107116

Algorithmic Trust and the Advertising Imperative

Manuscript in preparation

- Conceptual framework for generative AI, persuasion, and compliance in regulated financial-services communication.

Generative Artificial Intelligence and the Restructuring of Advertising Intermediation

Manuscript in preparation

- Examines legacy walled gardens, hybridized gardens, and the model layer as a tri-level architecture of advertising intermediation.

Stop Chasing Referrals: The Evolution of Client Acquisition

September 2025

AdvisorHub

What We Get Wrong About the Racial Wealth Gap

January 2022

TEDxEustis

- More than 75,000 views.

SELECTED ACADEMIC AND PROFESSIONAL PRESENTATIONS

- 2026 | Golden Table Talk: Metamorphosis in Real Life | Panelist, Mt. Zion Progressive Missionary Baptist Church.
- 2026 | Wit, Wisdom & Women | Featured speaker, Athena Society; leadership, abundance, and success.
- 2026 | AEJMC Law Division Preconference | Panelist, Be Prepared: Reputation Management in a Polarized AI World.
- 2026 | IQONIK Talks, The Speaking Industry Expo | Positioned for Profit.
- 2026 | AI Insights Summit | AI Unleashed.
- 2026 | AI Innovation Summit | Positioned for Profit.
- 2026 | Women Entrepreneurship Conference | Keynote, Power to Powerful.
- 2026 | Junior Achievement Tampa Bay, 3DE EmpowerHer | Keynote.
- 2025 | The Value Equation | Private financial-industry forum.
- 2025 | Edward Jones B.E.L.I.E.V.E. Workshop | B.E.L.I.E.V.E. in Your Brand.
- 2024 | Jump\$tart National Educator Conference | What Does This Look Like Tomorrow?
- 2024 | Women Leaders Association | Transform Your Marketing.
- 2024 | InformaConnect EDGE Conference | Featured speaker.
- 2023 | Civility Experts | Civility and Leadership.
- 2023 | Black Wealth Summit | Financial Empowerment.
- 2022 | TEDxEustis | What We Get Wrong About the Racial Wealth Gap.

INDUSTRY AND EXECUTIVE LEADERSHIP

Founder and Chief Executive Officer

August 2023-present

The RBI Group | St. Petersburg, FL

- Lead a strategic marketing, brand, and AI advisory firm serving registered investment advisors, asset managers, financial-advisor enterprises, professional-services organizations, and mission-driven institutions.
- Define governed AI and automation roadmaps, integrated marketing strategy, messaging, segmentation, dashboards, and performance measurement.
- Lead a multidisciplinary team across strategy, content, digital, web, communications, events, and marketing operations.

Head, Advisor Inclusion Networks, Private Client Group

September 2019-June 2023

Raymond James Financial | St. Petersburg, FL

- Set strategy and operating direction for national advisor networks supporting recruitment, retention, engagement, and advancement across a firm serving nearly 8,000 financial advisors.
- Scaled enterprise infrastructure from one program to four advisor communities with dedicated leadership, symposiums, professional development, and measurable growth objectives.

Chief Marketing Officer

April 2017-September 2019

Raymond James Investment Management, formerly Carillon Tower Advisers | St. Petersburg, FL

- Set global marketing and brand strategy for seven affiliated investment-management brands across institutional and retail channels in the United States, Canada, and the United Kingdom.
- Built and led a global marketing organization of approximately 40 professionals and directed marketing through a major acquisition.

EARLIER INDUSTRY LEADERSHIP

Senior Manager, Marketing and Closed-End Funds Investor Relations

September 2014-April 2017

abrdn, formerly Aberdeen Standard Investments | Philadelphia, PA

- Led marketing strategy, investor communications, product positioning, campaigns, and business-development support across multiple markets.

Institutional Marketing Lead

January 2013-August 2014

OppenheimerFunds, now Invesco | New York, NY

- Led the launch and positioning of a new institutional business line.

Vice President, Marketing

October 2010-October 2012

Walkers | George Town, Cayman Islands

- Created global growth, brand, and integrated marketing strategy across international financial centers.

Vice President, Institutional Marketing

August 2008-October 2010

J.P. Morgan Asset Management | New York, NY

- Directed strategic marketing, institutional campaigns, client tools, market guides, webinars, roadshows, and global conferences.

Earlier Marketing and Communications Leadership

1996-2008

The Bank of New York and other Wall Street and financial-services organizations | New York, NY

- Held progressively responsible roles in institutional marketing, integrated communications, brand strategy, product marketing, demand generation, and investor communications.

HONORS AND RECOGNITION

- 2026 | Strong Woman Award, Fuel Her Fire Gala, Girls Inc. of Pinellas County.
- 2026 | Women You Need to Know, St. Pete Life Magazine.
- 2025 | Luminaries with Heart Award, ThinkAdvisor.
- 2025 | Advisory Board Impact Award, Florida Financial Educators Council.
- 2023 | 50 Top Distinguished Professionals Under 50, Association of African American Financial Advisors.
- 2022 | BusinessWoman of the Year, Tampa Bay Business Journal.
- 2021 | Global Top 100 Executive Allies, LGBT Great.
- 2021 | IA25 List for Industry VIPs, ThinkAdvisor.
- 2021 | Diversity Leadership Award, Penn State Smeal College of Business.
- 2020 | Jamie E. DePeau Leadership Award, Financial Communications Society.
- 2020 | 20 People Who Will Change Wealth Management, Financial Planning.
- 2018 | CMO Leadership Award, The CMO Club.
- 2017 | Rising Stars of Financial Marketing, Gramercy Institute.
- 2016 | Rising Stars of Mutual Funds, Fund Action/Fund Direction.

ACADEMIC, PROFESSIONAL, AND COMMUNITY SERVICE

- Zimmerman School Advisory Council, member, 2025-present.
- USF Faculty AI Workshop, co-facilitator, 2026.
- Zimmerman Student Talent Book initiative, architect, 2025-present.
- Leadership Florida, lifetime member, Cornerstone Class 39; West Central Regional Chair, 2025-2026.
- EmpowHERment, Board Chair.
- United Way Suncoast, Board Member; former Chair, Admiral Society.
- IDEA Public Schools Florida, Board Chair.
- National Financial Educators Council, Florida Advisory Council.
- Susan G. Komen, National Board Member, 2021-2024; Chair, Investment Committee, 2022-2024.
- Wilmington University College of Business, Marketing Advisory Committee, 2021-2025.
- University of South Florida, Corporate Mentor, 2019-2025.
- American Corporate Partners, Veteran Mentor, 2020-2022.
- American Stage Theatre, former Board Member and Co-Chair, Equity, Diversity & Inclusion.
- The CMO Club, Tampa Bay Chapter President, 2017-2023.

PROFESSIONAL CERTIFICATIONS, LICENSES, AND AFFILIATIONS

- Certified AI Consultant, AI InnoVision, CPD accredited.
- Generative AI Certification, University of South Florida.
- Certified Financial Education Instructor, National Financial Educators Council.
- Registered Corporate Coach, Worldwide Association of Business Coaches.
- Master Certified Civility Trainer®, Courtesy Coach®, and Civility at Work Trainer®, Civility Experts.
- FINRA Series 6, 7, 26, and 63; qualifications maintained through the FINRA Maintaining Qualifications Program.
- Professional affiliations: Association for Education in Journalism and Mass Communication; International Association of Artificial Intelligence Consultants.

PUBLIC ENGAGEMENT AND MEDIA

WFLA Bloom Tampa Bay and Bloom Health Club

2024-2026

Recurring television contributor and guest

- 2026 segments include Measuring Success Beyond Titles and Income; How Hardship Became a Catalyst for Intentional Living; Intentional Leadership; Fine Tuning Your Money Mindset; and The Abundance Framework.

WFLA Rooted in Progress

2026

Podcast and digital conversation

- Redefining Wealth and Success.

WalletHub

2025

Expert contributor

- Expert commentary on credit access and credit-building strategies.

The Unleashed Life with Dr. Renée Baker

September 2024-present

Podcast host

- Conversations on mindset, money, mastery, leadership, and financial well-being.

Podcast appearances

- Financially Empowered Women, Own Your Worth, 2025.
- Bartelle's Money Talk, Breaking Free, 2025.
- Financial Secrets Revealed, From Side Hustle to CEO, 2024.
- Disruptive Forces, Making Dollars and Sense, 2024.
- Working on Financial Literacy, conversation with Dr. Renée Baker, 2023.
- The Inquisitor Trust Podcast, Unlocking Financial Freedom, 2023.
- Her Success Matters, InvestmentNews, 2020.

Selected print and digital features

Bloomberg; Tampa Bay Business Journal; Financial Planning; ThinkAdvisor; AdvisorHub; InvestmentNews; WalletHub; ABC Action News; St. Pete Life Magazine; Florida Financial Educators Council; Penn State Smeal College of Business.