CLIENT NAME

Address, City, State ♦ (999) 422-1655 ♦ clientname@gmail.com

LICENSED PRIVATE BANKING PROFESSIONAL
20+ Years of Experience Managing Mulit-Million Dollar Comercial Portfolios

Liquidity Management Solutions ~ Omega Commercial Credit Training ~ Revenue Enhancement & Growth
Series 7 and 63 Licensed ~ Licensed Financial Analyst ~ Operational Efficiency ~ Portfolio/Asset Management

Consumate, award-winning Licensed Private Banking Professional and CFP® Candidate respected for expertise in wealth and asset management, strategic business planning and development, internal financial controls and budgeting, and strengthening financial operations to maximize profitablity as well as productivity. Experienced private banker and middle market commercial lender with formal credit training and expertise working with high net-worth clients. Accompllished leader and outstanding strategist skilled in effectively driving key performance metrics, managing and nurturing talent and overseeing complex business intiatives. Proven leader and motivator of cross-functional teams in line with accelerated business growth.

AREAS OF EXPERTISE

Strategic & Tactical Planning ● New Business Development ● Strong Client Relationships ● Regulatory Compliance
Wealth Management/Securities ● Investment Strategies ● Risk Management/Underwriting
Brand Planning ● Cross-Selling Proficiency ● Strategic Market Analysis ● Product Management ● Profit & Loss
Investment Planning/Allocation ● Cash Management ● Budgeting & Forecasting ● Integrated Marketing Campaigns
Planning & Execution ● Strong Organization & Analytical Abilities ● Competitive Analysis
Lead Generation/Sales ● Advanced Excel Training, Emory University ● Key Account Management
Multitasking in Intense Business Environments ● Superb Written & Verbal Communications Skills

PROFESSIONAL EXPERIENCE

MORGAN STANLEY PRIVATE BANK, Atlanta, GA
Private Banker, Vice President, 2010-2014
Primary client service contact providing quality credit and liquidity management solutions to high net worth clients. Strengthened client relationships by offering strategic solutions and sound advice backed by strong partnership and counsel with financial and private wealth advisors. Created and implemented comprehensive programs to increase awareness and understanding of liquidity management among financial advisors, firm management, private wealth advisors and client service associates. Accepted the responsibility of managing the daily sales pipeline.

Key Accomplishments: Loan production in dollars (funded loans and lines of credit)

- Presented the ***Summit Club*** Award, $131,290,000, 2011, **158% of goal**
- Production $199,860,000, 2012, **136% of goal**
- Private Banker Advisory Counsel, 2011-2012
- Production: $185,655,000, 2013
- Mid-Year Production: $105,000,000, 2014

DARBY BANK AND TRUST COMPANY, Savannah, GA
Commercial Relationship Manager/Special Assets, VP, 2010
Challenged to manage a $70 Million Commercial Loan Portfolio consisting of performing and non-performing loans. Met and exceeded all management and performance expectations.

Key Accomplishments

- Successfully achieved results through proper management of all aspects of non-performing loans including: restructures, forbearance agreements, and foreclosures. Bank entered into receivership during 2010

COASTAL BANKING COMPANY, Beaufort County, SC
Market Manager, VP, Southern Beaufort County, 2007-2010
Principal strategist and manager of $40 Million Commercial Loan Portfolio. Developed and nurtured new relationships in order to increase profitability. Managed all Southern Beaufort County employees for CBC.

Key Accomplishments

- Exceeded expectations in all aspects of underwriting and credit management process which included: new commercial loans, portfolio management, troubled debt restructures, and special assets.

PROFESSIONAL EXPERIENCE CONT.

BB&T, Savannah, Georgia
Business Services Officer IV, Vice President, 2005-2007
Controlled and oversaw a $60 Million Commercial Loan Portfolio consisting of companies with annual sales greater than $2.5 Million. Performed underwriting of all new loans and collections on past due accounts.
Key Accomplishments

- Analyzed and evaluated existing relationships in order to find worthy prospects. Developed new business by generating an excess of 10 calls daily.

UBS FINANCIAL SERVICES, INC., Tampa, Florida
Regional Lending Manager, 2004-2005

- Hired to retain and increase loan balances for a global investment firm within region consisting of 13 branch locations across Florida. Managed portfolio of $150 Million in outstanding loan balances and educated/trained 170 Financial Advisors.

WACHOVIA BANK, Savannah, Georgia
Business Banker, Vice President, 2003-2004

- Managed small business loan and deposit portfolio of $50 Million and $25 Million, respectively. Responsible for making 50 out-bound calls per week and adding $1 Million in new deposits and $1.5 Million in loan balances per month.

Previous positions include Business Service Officer I/Vice President for BB&T in Savannah, GA; Commercial Portfolio Specialist/AVP for SunTrust Bank in Savannah, GA; and Assistant Vice President for Wachovia Bank in Savannah and Statesboro, GA.

EDUCATION, LICENSES, & CERTIFICATION

- **Bachelor of Business administration**, Finance, Georgia Southern University, GA

Licenses
NMLS License: 797777
FINRA Series 7
FINRA Series 63
CFP® Candidate, Northwestern University

PROFESSIONAL AFFILIATIONS

Former Board Member: Community Housing Services Agency, Savannah, Georgia
Junior League of Savannah: South Carolina Low Country Projects Volunteer, 2009-2010

- Nominated for Provisional Advisor for 2010-2011 term
- 2006 Auction Committee Chair (Raised $40,000 for the Savannah community, doubling Previous years Auction results)

Habitat for Humanity: Volunteer
Ronald McDonald House: Volunteer at both Atlanta locations
Atlanta Food Bank: Volunteer
USTA, ALTA and Ultimate Tennis