

**Vice President, Private Banking Group (1990–1993)**

Managed the Greenwood private banking office and staff. Managed \$53 million portfolio (loans and deposits). Aggressively marketed and cross-sold all bank services. Reviewed and strengthened asset quality, including performing workouts, restructures and transfers of problem credits.

**Results:**

- Consistently exceeded production goals for new loans, deposits and fee income. Recognized as an effective negotiator, generating highest level of fee income (\$350,000 annually) division-wide.
- Turned around an adversarial relationship between consumer lending and private banking and forged a cohesive team.

**Assistant Vice President, Private Banking Group (1989–1990)**

Recruited to establish, build and manage Westchester office private banking operations. Designed marketing plan and originated new business by nurturing existing relationships and referral sources.

- Built book of clients from zero base and managed top quality loan, investment and deposit portfolio (\$7.1+ million) with no loan losses. Generated over \$50,000 in annual fees.

**WEBBER BANK, New York, New York (1984–1989)**

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**Banking Officer, Private Banking and Trust Division**

**Banking Representative II, Community Banking (1983–1984)**

Developed and executed an effective business development plan through intermediaries, colleagues and existing client base. Built and managed solid client relationships; communicated with other bank division personnel to effectively resolve any client issues.

- Grew and managed \$12 million deposit portfolio and \$6 million loan portfolio.

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**EDUCATION / PROFESSIONAL DEVELOPMENT**

**COLUMBIA UNIVERSITY, NEW YORK, NEW YORK:**

**M.B.A. in Finance, 1999**

**B.A. in Finance, 1984**

Seminars: Credit Development Program ~ Fiduciary Banking ~ Management Information Systems ~ Asset Allocation Service and Estate Planning