

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)

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