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## Summary of Experience

Financial Services Executive with over 20 years of office management experience in banking, operations, and client management. Expertise in consumer and small business banking, credit card operations, new credit and deposit product development, sales management, branch operations, profit and loss accountability, compliance, risk management, consumer credit, mergers/acquisitions, and outbound sales activities. High level of client service skills, experience in real estate sales, marketing, and project management. Proficiency with Microsoft Office, Word, Excel, and Power Point.

### US Bank, Milwaukee, WI

11/11 -present

Consumer Banking Manager- Manage a team of 12 Bankers, Tellers, Supervisor, and Asst. Mgr.

- Support Sales and Operations initiatives, sales meetings, lending, and guest development. Partner with Mortgage, Investment, Private Banking, and Merchant partners. Coach staff to minimum standards and goals.
- Spend 60% on outbound business development calls with clients and prospects. Maintain book of business relationships, and present desired outcomes via needs analysis IMPAX presentations.

### M&I Support Services Co. Milwaukee, WI

9/07-10/11

A diversified bank holding company with assets of \$63.4 billion and over 347 banking offices in Wisconsin, Arizona, Florida, Indiana, Minnesota, Missouri, Kansas and Nevada.

Payment Services Supervisor II/Check Adjustment Division - Responsible for managing daily activities, facilities, personnel, and production for up to 50 employees and supervisors on two shifts.

- Lead weekly supervisor meetings, one on one's, set performance and department goals, manage projects, policy enforcement, ISO certification, departmental communications, conversion calls, client escalation contact, analyze data and create reports/spreadsheets. Primary contact for all performance/operations issues.
- Review internal and external service levels, non-conformance, case management, audit issues, and oversee team managing 2-5000 new cases each week. Immediate back up for Vice President of the division.

### Associated Bank, N.A., Milwaukee, WI

3/02-9/07

A diversified bank holding company with assets of \$22 billion and 300 banking offices in Wisconsin, Illinois, and Minnesota. Formerly State Financial Bank until 10/05

AVP/Branch Manager Hales Corners (9/03-9/07)- Responsible for directing retail branch activities, facilities, personnel, consumer and business banking deposits, loans, profitability, marketing, and goal planning for 17 employees. Participate in joint calls with Commercial Lending, Card Services, Treasury Management and Wealth Management. Represented the bank in many community events. Deposits of \$953,000, a \$735,000 loan portfolio, with an \$8.5 small business loan portfolio. Mentor to new Branch Management Staff.

- Implemented daily sales initiatives including huddles, coaching, observations, and sales meetings to increase accountability for individual sales results. Perform check in's, and daily reporting feedback through organization. Result: Average increase in teller referrals by 61%, increased closed referrals by 9%. Average increase in banker sales by 25%, deposits by 4.5%, and consumer loans by 36%.
- Manage small business loan portfolio. Renew and increase loan balances, cross-sell services on existing loans. Initiate and close new business loans up to \$500,000. Dedicated marketing plan for outbound business calls. Result: Net increase in business loan portfolio of 3%, and cross sell increase of 1.5 deposit products for existing business loan customers.

Assistant Vice President/Regional Manager (3/02-9/03) Responsible for four locations in Waukesha County with 23 employees, deposits of \$76 million, and loans of \$50 million. Develop branch business plans, budgets, sales activities, underwrite consumer loans, branch operations, security, high level employee issues, budgets,

incentive programs, and bank partner relationships. Weekly Branch visits, check-in's, operational and sales goal directives.

- Lead weekly Branch Manager Meetings focused on sales initiatives and activities involving all branch staff. Result: Net increase of 5% in deposits and 8% in loans. Increased Teller referrals by 12% with closed referrals by 15%. Increased banker referrals by 16%.

Anchor Bank, N.A. Milwaukee, WI (formerly West Allis Savings Bank & Ledger Bank) 9/99-3/02

- Branch Manager II (11/01-3/02) - Responsible for Greenfield office as well as a start-up branch in Glendale. Result: Resulted in deposit growth of 7.5% in Glendale.
- Branch Manager I (1/01-11/01)- Responsible for two West Allis offices. Result: Created and implemented business development program for business district in West Allis and increased business deposits by 8%. Performed sales calls, outbound visits, and business proposals.
- Branch Manager I (9/99-1/01)- Responsible for New Berlin Office. Result: Train Personal Banking Staff on consumer loan process, accompany commercial lenders on calls, proposing retail product line. Increased business and consumer deposits by \$5 million.

Wells Fargo Bank N.A. Milwaukee, WI (formerly Norwest Bank) 10/89-9/99

- Branch Manager/AVP (6/97-9/99)- Responsible Mayfair location Branch Sales and Operations, performing annuity sales, overseeing a staff of 12 employees.
- Branch Manager Trainee (5/95-6/97) -in many locations and positions within the branch network after performing for a year as a Teller Supervisor II responsible for two Shorewood locations, trained as personal banker, second in charge of the branch. Also worked in Item Processing 2<sup>nd</sup> shift as a Team Lead in the Proof and Sorter operations from 10/89-5/95

University Accounting Service, Inc Brookfield, WI 9/89-5/95

Nationwide student loan billing service for approximately 500 Colleges and Universities.

- Client Support Manager/AVP (8/90-5/95)- Responsible for annual client/prospect seminars nationwide, service calls, financial reporting issues, attend conferences, prepare RFP's. Communicate with The Dept. of Education and disseminate regulatory, product, price and service changes/enhancements to staff and clients. Accompany Marketing on prospect calls. Ensure client satisfaction is met. Review client portfolios to increase products and services.
- Client Supervisor (9/85-8/90)- Responsible for 12 Service Reps with 180 clients providing daily support and monitoring workloads. Take care of high level client or customer concerns after a year performing as a Client Service Rep responsible for 15 clients, their borrowers, financial recordkeeping, data entry, phone calls, forms, and compliance tasks.

Previous Positions include Quadgraphics Billing Department, Hoffman York Advertising Accounting Department, Retail Store Management positions.

### Education and Licenses

- Cardinal Stritch University, College of Business Management. Anticipated Bachelor of Science in Business Management degree in 2012.
- Wisconsin Real Estate Salesperson License in 2004. First Realty/GMAC up to 2009; currently licensed.
- Wisconsin Life Insurance License, series 16 in 1999 (no longer active).
- Waukesha County Technical Institute, courses in Business Law, Supervision, Accounting.
- American Institute of Banking, courses in Lending, Supervision, Business Management.

### Accomplishments and Community Involvement

- Assistant and Head Coach for Girls Volleyball at West Allis Park and Rec in 2009 & 2011
- Gold Membership Level/ Real Estate Sales in 2007; recognized in Milwaukee Magazine.
- Junior Achievement Volunteer teaching at Muskego High School in 2007.
- Vice-President of the Chamber of Commerce in Hales Corners in 2006-2007.
- Board member /Co-Chairman for the City of West Allis Review Board in 2007.
- Chamber of Commerce member for the City of West Allis in 2006-2007.
- Served on various PTA, Employer, Church boards and organizations.