

W. JEFFREY PHILLIPS

[[Contact Information Redacted]]

Objective

To direct business initiatives in a way that creates an atmosphere of unity, personal development and the accomplishment of established goals.

Work Experience

2018 – current Landmark National Bank Prairie Village, KS

Senior Vice President

- * Serving in senior leadership role charged with growing and developing a team of bankers and building an exceptional environment that draws in potential fans of the displayed priorities and values.
- * Establishing a new location within the metro, overseeing site selection, design/construction and directing marketing/communication efforts.
- * Actively serving on the bank's Senior Leadership team providing insight into expansion opportunities, contributing to strategic goal setting and prioritizing initiatives.

2010 – 2018 Missouri Bank & Trust (Mobank) Kansas City, MO

Senior Vice President

- * Served in senior leadership role providing overall direction, selection of initiatives and execution of prioritized efforts.
- * Successfully grew customer base primarily focused on meeting entrepreneur's and executive's business and personal banking needs.
- * Served on ALCO, Loan Committee, Contribution Committee Chair, Enterprise Risk Committee, Post-acquisition troubleshooting committee Chair
- * Helped lead transition team during recent acquisition, focused primarily on commercial loan process, loan policy and credit underwriting
- * Oversaw \$120 million loan portfolio with 268 loans, \$22 million deposit portfolio with 451 accounts.

2007 – 2010 Great Western Bank Shawnee, KS/ Kansas City, MO

Vice President

- * Managed commercial loan portfolio consisting of Commercial Real Estate, Manufacturing, Retail and Service industry businesses. Actively grew \$34 million portfolio through small existing customer base, but largely through new client acquisition.
- * In 2009, "booked" \$25 million in credit facilities, of which \$21 million was "new money" with \$146,000 in loan fees. In 2009, exceeded deposit growth goal by 322%, raising \$3.7 million in new non-cd funds. In 2008, "booked" \$20 million, \$8 million "new money" with \$31,000 in loan fees. Within first 9 months, "booked" \$9 million, \$6 million "new money".
- * Served as member of regional management team helping to coordinate sales initiatives, addressing staffing functions, reviewing bank financials and organizing strategic initiatives. Assist in evaluation of new branch locations and/or potential bank acquisitions. Created management reports by analyzing deposit and loan information. Served on regional ALCO and led initial efforts in Treasury Management. Assisted in creation/ monitoring of regional budget. Served on internal national loan review team.
- * Provided leadership in weekly sales meetings: setting the agenda, leading the team in developing action plans and demonstrating effective calling habits and techniques. Held

participants accountable to commitments and provided assistance in reaching established goals.

- * Actively involved in multiple community outreach efforts including the creation of a 4th grade savings curriculum.

2005 – 2007

Gold Bank/M&I Bank

Kansas City, MO

Vice President, Business Banking

- * Personally oversaw \$115 million loan portfolio consisting of Commercial Real Estate, Manufacturing, Retail, Technology, Transportation and Importing/ Exporting businesses. Clients ranged from SBA guaranteed small businesses to high Net Worth individuals.
- * In 2006, “booked” \$68 million in credit facilities, of which \$15 million was “new money” to the bank from both existing and new clients. Loan closings generated \$72,000 in loan fees. In 2005, “booked” \$25 million, \$14 million “new money” with \$69,000 in loan fees.
- * Personally managed 2 of the bank’s 5 largest international import/ export customers in the country. Also oversaw “Top 10” deposit relationships of Plaza location.
- * Systematically called on targeted individuals for business development opportunities. Solicited new commercial loan and deposit relationships resulting in \$14 million in new prospect requests in first 120 days.
- * Serviced existing customer accounts, performed regular reviews and/or inspections of existing credits and followed-up on past due or watch list credits. Reduced file exceptions by 60% within first 6 months.

2003 - 2005

Gold Bank

Leawood, KS

Vice President, Director of Retail Banking

- * Developed, implemented, and managed the retail strategy in support of the company’s overall strategic direction and profitability for three states and over 25 branches. Established goals, timelines and responsibilities for the successful implementation of the retail strategy.
- * Oversaw the development of new products as well as eliminated or enhanced existing products as needed. Coordinated the effective introduction and delivery of products into the Gold Bank system. Created core product offering as well as promotional products with attractive features. Consolidated 53 deposit products to 9 core products with minimal customer loss.
- * Managed and directed lines of business that related to the retail scope. Provided leadership and directed the efforts of credit cards, mortgage/ consumer lending, ATM and consumer Internet banking services. Managed relationships with product/service vendors such as Deluxe, Loomis, Internet Banking, Phone Banking and ATM/ Debit Card network.
- * Directed the retail service delivery and established specific and measurable goals for the retail staff. Provided sales and product training and directed efforts to support retail activities in bank locations. Directly supervised bank managers to ensure retail goals were achieved. Developed and implemented retail incentives program that fairly and effectively recognized goal achievements.
- * Created teller/personal banker user group to address operational issues and improve customer experience. Introduced product information sheets to help bankers understand product features, prospective customers and attractive benefits to deliver.
- * Directly managed the call center staff ensuring exceptional customer experiences and provided needed product and sales training for the call center staff.

- * Influenced operational decisions when impact would be witnessed by retail staff to insure consistent and timely implementation. Created training department for operational changes, new hire orientation and product knowledge.
- * Led retail technology efforts/ development of automated sales tracking system, electronic bank statements, mystery shopping program and referral tracking system. Assisted in core operating system conversions.
- * Worked closely with Marketing contacts to create both external and internal campaigns, identify target markets and package products/ services for delivery.
- * Specific accomplishments include Customer Acquisition, Product Development, Communication/Infrastructure and Sales/Service Initiatives (detailed listing available)

2002 - 2003 Gold Bank Oklahoma City, OK
Sr. Vice President, State Personal Banking Manager

- * Aided in the creation, development and administration of employee incentive programs
- * Created communication forums for Personal Banking Managers and Departmental Managers
- * Coordinated efforts of Operations, Marketing, Compliance and Senior Management teams
- * Established individual and team goals as well as timeframes for achievement
- * Instigated development of retail and commercial products
- * Conducted and directed Sales and Service training
- * Led evaluation of operating procedures and implemented needed improvement. Conducted onsite operational audits and responded to compliance audits.
- * Evaluated financial performance of individual locations and entire bank, concentrating efforts of staff to reach established goals

2000 - 2002 Gold Bank El Reno, OK
Vice President, Commercial Lending

- * Serviced loan portfolio of over \$12 million composed of over 300 relationships consisting of residential construction, light agriculture, small business and commercial real estate
- * Actively pursued new clients, while effectively servicing existing clients
- * Lead employee training and information sessions
- * Actively involved in budgeting, hiring and various other management functions
- * Continued duties as CRA officer, local marketing director, and security officer

1998 - 2000 American Heritage Bank El Reno, OK
Loan Officer, Marketing Director

- * Serviced loan portfolio of \$4 million composed of over 350 consumer and small business relationships
- * Organized business development efforts, specifically entering new geographic market
- * Coordinated both internal and external marketing campaigns
- * Supervised employee incentive programs
- * Directed community outreach programs – America’s Promise, Pictures with Santa, etc.
- * Managed CRA reporting

1994 – 2000 American Heritage Bank & MidFirst Bank
 Intern, Teller, Bookkeeper

- * Performed in all operations positions, assisted in special marketing projects, created intern program

Education

2002 - 2005	University of Oklahoma	Norman, OK
	<i>Masters of Business Administration</i>	
1994 - 1998	Oklahoma State University	Stillwater, OK
	<i>B.S. Agricultural Economics/ Minor in Finance</i>	

Industry Education

2003 - 2004	Graduate School of Banking in Colorado	Boulder, CO
	<i>Faculty 2006 – 2015 ; Student 2003 - 2004</i>	
	<ul style="list-style-type: none">• Received distinction of graduating with Honors, recognized for highest exam score• CEO of Bank Management Simulation “Outstanding Bank”• Served as faculty aiding in curriculum composition and direction of learning experience	
Feb – Jun 2001	OBA Intermediate School	Stillwater, OK
	<i>Honors Graduate, Scholarship Recipient</i>	
Mar 2000	OBA Commercial Lending School	Stillwater, OK
Oct 1999	OBA Consumer Lending School	Stillwater, OK

Industry Involvement

Graduate School of Banking in Colorado - State Alumni Coordinator, Faculty member
Authoring articles helping business owners with their banking relationships
Young Bankers of Missouri
Oklahoma Bankers Association Intermediate School Board, Marketing Committee,
Summer Intern Program Host

Community Involvement

Kansas City Industrial Council – Board of Directors, Past President, Past Secretary, Past Treasurer, Committee Chair
Hope Network – Board of Directors, Committee member
Friends of Hale Cook Board – Board member, Past Treasurer
The Halo Foundation – Board of Advisors
Uniting at Southwest – Board of Advisors
KCMO Mayors Challenge Cabinet – Inaugural committee
Greater Kansas City Chamber of Commerce – Centurion Leadership Program Steering, Centurion Alumni Board of Directors, CAB Civic Co-Chair, Treasurer
First Baptist Raytown – Chairman Deacons; Director of Young Married Class; Chairman Stewardship Team, Chairman Transition Team, Chairman Pastor’s Advisory Team
Hillcrest Transitional Housing of Kansas – Past Chairman Board of Directors, Awarded 2011 “Volunteer of the Year”
FBI Citizens Academy – Spring 2013
Downtown Council Board
United Way of Greater KC – Young Leaders Society
Alpha Gamma Rho Fraternity Alumni Board of Directors – Secretary, Pi Fund Committee
Active in Kansas City Manufacturers Network, Association for Corporate Growth, Mercury Club

Serving on various panels, authoring articles and judging competitions regarding Entrepreneurship, Financial Markets, Board of Director service and Leadership

Personal

[[Family Information Redacted]]

Enjoy sports, reading, movies and hiking