

Treasury Management Executive – Summary

Strategic, community-focused executive with over two decades of leadership experience across commercial, treasury, private, and consumer banking. Demonstrates a strong track record of driving revenue growth, operational excellence, and client-centric solutions across diverse financial services environments.

Core Expertise

- Treasury management strategy and cash management solutions
- Commercial and small business banking (including lending and deposits)
- Private banking and high-net-worth client advisory
- Revenue growth, market expansion, and portfolio development
- Cross-functional leadership and team development
- Client experience optimization and relationship management

Leadership & Impact

- Led regional and market-level teams, including direct oversight of managers and specialized banking professionals serving business and consumer clients
- Built and scaled high-performing teams through strategic recruitment, hands-on coaching, and performance alignment
- Developed and executed growth strategies across multiple banking lines, consistently increasing deposits, loans, and client acquisition
- Designed and implemented innovative treasury and payment solutions to meet evolving client needs and improve operational efficiency
- Strengthened market presence through community engagement, networking, and strategic partnerships

Strategic Contributions

- Drove cross-functional collaboration between business lines (commercial, retail, operations, and wealth) to deliver integrated financial solutions
- Acted as a trusted advisor to internal stakeholders and clients, providing insights on market trends, financial strategy, and operational improvements
- Leveraged technology and digital capabilities to enhance client experience and streamline banking operations
- Built centers of influence and referral networks to support sustained business development

Professional Strengths

- Proven ability to manage complex client relationships, including small to mid-sized businesses and high-net-worth individuals
- Expertise in structuring and delivering customized financial solutions across lending, treasury, and investment services
- Strong background in aligning sales, marketing, and operational initiatives with enterprise goals

- Skilled in navigating full-spectrum banking operations while maintaining a client-first approach

Education & Leadership

- Bachelor's degree in Business Leadership (graduated with highest honors)
- Advanced certification in retail bank management from a top-tier graduate program
- Board leadership experience with nonprofit and community organizations, including executive roles and financial oversight

Overall Value

A results-driven executive leader known for blending strategic vision with execution. Brings a relationship-first mindset, deep industry expertise, and a commitment to innovation, making a measurable impact on organizational growth, client success, and community engagement.