ROBERT JETTE, JD

[redacted] Cell: [redacted]
Pleasanton, CA [redacted]

SENIOR VICE PRESIDENT/DIRECTOR WEALTH MANAGEMENT & TRUST SERVICES
MANAGER OF BANK TRUST DEPARTMENT • SALES MANAGER TRUST SERVICES

Driven, analytical, astute and business savvy executive level financial strategist with 28+ years experience in investment management, wealth management and trust services. Adept in discovering new business opportunities, driving sales lifecycle and building new markets from ground up. Comprehensive knowledge of modern portfolio theory and investment management analysis. Solid experience in financial and strategic planning, high-dollar negotiation, revenue generation and innovative marketing. Superb salesperson with proven track-record of identifying and acquiring high net worth accounts, diversifying and creating high performing portfolios and vastly improving sales performance of employers. Empowering team leader capable of motivating employees to increase asset growth and sales activities. Consistent top performer in revenue generation with history of surpassing sales objectives. Available for relocation throughout U.S.

Investment Consulting • New Business Development • Strategic Planning • Market Research & Analysis
Territory Management & Development • Risk Management • Team Leadership & Development
Sales • Marketing • Business Planning • P & L Management • Branding & Positioning • Client Relations

---

PROFESSIONAL EXPERIENCE

CCOW - CAPITAL CORP. OF THE WEST, Fresno, CA 2005 - 2009
Senior Vice President - Director of Wealth Management & Trust Services
Entrusted to grow trust and retail investment divisions of this $2B, 600-employee, financial services institution offering lending, retail, investment and trust services to commercial clients. Additional accountabilities included sales, business development, marketing, key account management, P & L, revenue generation, product management, compliance and client relationship management.

- Orchestrated start up and successful growth of trust services department from zero to ~$2MM per month, achieving 400% sales growth, 100% growth in staff and entrenchment of department into company's culture.
- Devised synergistic marketing partnership with another business effectively creating 20 centers of influence and substantially increasing referral business.
- Reengineered and grew retail investment division from negative balance sheet to become profit center. Efforts included design and execution of relentless marketing strategies geared toward raising awareness of department throughout marketplace.
- Developed professional contacts pool to uncover qualified prospects for new accounts, growing assets from zero to $85MM in just 4 years.

COMERICA BANK, Palo Alto, CA 2003 - 2004
Vice President - Trust Development Manager
Charged to redesign and grow trust services department for former 15th largest financial services institution in nation offering lending, retail, investment and trust services to commercial clientele. Additionally mentored and developed 10 trust officers, assistants and staff members.

Continued…

- Reengineered failing department suffering lack of asset and account growth for 3 straight years to realize 100% sales growth, 25% improvement in productivity and substantial increase in internal and external referrals. Efforts included staff restructure, continuous communication improvement and integration into companywide systems and culture.
- Grew sales activity within local market 45%, booking $30MM+ in new trust assets.
- Improved department's bottom line $20MM by training trust officers to seek and acquire additional assets from existing account portfolio.

MORGAN STANLEY, Cupertino, CA 2000 - 2002
Investment Advisor - Broker
Independent Investment Advisor aiding high net worth individuals in asset growth and wealth management for this global financial services firm and market leader in securities, asset management and credit services.

- Improved life insurance and annuity sales from branch by 93% via development and delivery of weekly insurance sales training to fellow advisors.
- Increased assets under management from zero to $50MM within first 2 years, and doubled fees earned between year 1 and year 2 through client portfolio diversification and targeted marketing strategies to centers of influence within company footprint.
- Crafted portfolio of affluent clients, growing sales from ground up and earning receipt of National Sales Director Achievement Award within first year of tenure.

RANKIN O'NEAL LUCKHARDT & LUND, San Jose, CA 1996 - 1999
Attorney at Law - Associate
Practicing attorney in areas of estate planning, trusts and other legal matters for high net worth client group within San Jose territory. Additionally accountable for business development, revenue generation, prospecting, policy development, staff training and new client acquisition.

- Delivered "high-touch" legal services to all clients, ensuring service satisfaction, inviting referral business and effectively growing client pool by 35% and propelling revenue growth without increased overhead expenses.
- Continuously sought, negotiated and solidified new business engagements yielding growth in practice from $550M to $1MM+ in total fees.

EARLY CAREER NOTES: Attorney at Law - Association - JETTE, OLLINGER AND GROSSMAN – ATTORNEYS AT LAW

EDUCATION & CERTIFICATION

Juris Doctorate, PEPPERDINE UNIVERSITY, Malibu, CA

PROFESSIONAL DEVELOPMENT

Continuing Education: Business Development for High Net Worth Individuals, 12 Wealth Management Issues, Business Development Planning & Management - Cannon Trust Services and Trusts, Estates and Tax Issues - Continuing Education of the California Bar Association (CEB)