Robert Jetté

[redacted], Pleasanton, Ca. [redacted]

Wealth Management & Trust Services Executive

28 years of experience delivering professional estate planning and investment services

Accomplished senior executive with a strong track record of successful investment and trust services management together with revenue growth to each business managed. Characterized as a cross discipline team builder that continuously identifies opportunities for asset growth and income generation utilizing current best practices in multiple bank disciplines. A results-driven manager with strategic planning, cross-functional leadership, creative development and communication skills. Available for relocation through out the United States

Core Competencies

P&L Management
Market Research & Analysis
Cross-Functional Leadership
Branding & Positioning
Direct Marketing
Strategic Planning & Execution
Sales & Business Development
Budget, Staffing, & Profitability
HNW client relationship services
Team Building & Strategic Plan Execution

PROFESSIONAL EXPERIENCE

Senior-Vice President
2004 - Present
Director of Wealth Management & Trust Services Department
Capital Corporation of the West (CCOW) dba County Bank

Leading integrated relationship teams of cross discipline services and products responsible for sales and services to the organizations HNW clients. Responsible for leading the growth of profitability by increasing team revenues, expanding services to existing clients, administrating the accounts as directed by the trust document and within the bank's, State, and Federal compliance requirements.

Key Achievements:

- Maintained the policies & procedures required for a compliant Trust Department.

- Develop and implement team sales business plan meeting the bank's growth and profitability
- Delivered personalized, attentive service to HNW client base through sound trust, investment, and estate advisory concepts.
- Establish and maintain relationships with external COI, local advisory boards, Civic Associations and organizations.
- Ensure that the unit works within the existing audit, compliance and regulatory framework
- Create sales programs and conducted training to staff identifying qualified leads
- Manage the top 25 relationships with average account size of 1 million and clients average net worth of 10-30 million
- Managed risk management practices, policies and procedures.
- Designed service standards applied to account maintenance and client contact.
- Obtained a satisfactory rating on all audits, internal, private professional and DFI/Federal
- Wrote and sponsored advanced tax & estate planning education presentations to promote the trust department.
- Conduct public speaking on related topics including fiduciary responsibilities, investing, and trust services
- Trained trust officers to uncover additional assets with the department's current account base adding 20 million to the department
- Cultivated professional contacts to uncover qualified prospects for new accounts adding 60 million to the department's asset base
- Drafted and implemented a sales plan which included both "eat and greet" or "lunch & learn" meetings with centers of influence
- Wrote and presented advanced tax & estate planning education presentations

---

2002-2004 Comerica Bank

VP - Trust Department Manager

Palo Alto, California

Department manager for a Bank's regional trust office including a staff of trust administrators, trust officers, investment professionals, institutional trust manager, Lenders, and Real Estate Manager. Coordinated trust sales to HNW individuals together with the cross selling of Bank's other products and services both at the Retail Branch and lending services levels

Key Achievements:

- Managed the HNW accounts of the most sensitive nature (average account sizes of 10 million) with average net-worth of 30 million
- Obtain satisfactory rating on all audits conducted during term as manager
- Trained trust officers (5) to uncover and capture additional assets from the Department's account base adding 20 million to department
- Worked with professional contacts within the region to uncover qualified HNW prospects for new accounts.
- Created and implemented a marketing plan which included both "eat and greet" or "lunch & learn" meetings with centers of influence

- Presented advanced tax & estate planning seminars to promote the bank's trust department
- Kept abreast of changing economic, legal, financial planning, investment trends and general market conditions impacting affluent clients
- Designed and implemented service standards applied to account maintenance and client contact
- Increased sales activity in the local market by 45% booking more than 30 million in new trust assets
- Cross referrals sent to other bank disciplines including retail branch and lending services.

1999 - 2001 Morgan Stanley

Investment Advisor

Palo Alto/Cupertino

Professional Investment Advisor in the Private Client Group **-** Worked independently as a Financial Advisor with high net worth individuals.

Key Achievements

- Volunteered and assigned duties as the office Life Insurance, Annuity and Estate Planning Coordinator
- Training brokers in large Life Insurance sales and business and estate planning techniques in HNW matters.
- Advised brokers in estate planning matters with HNW individuals including such issues as Rabbi Trusts, ILIT's, CRAT's CRUT's,CLAT's, CLUT's, Dynasty Trusts, and Generation Skipping Trusts
- Gathered accounts assets of 30 million and annual fee's of $300,000
- **Rookie National Sales Director Award –** 1999

1987 – 1998 Law Firm Rankin O'Neal

San Jose, Ca.

Attorney at Law

Associate attorney in the oldest law firm in San Jose, California handling matters involving HNW Estate Planning, Trust Administration, and Trust and Estate Tax Planning

Key Achievements

- Increased the client base through professional marketing and referrals
- Increased annual revenues by an additional 15%.
- Advised and drafted estate planning documents for High Net Worth (HNW) individuals
- Tax Planning for estates in excess of 5 million dollars including foreign national issues

---

1980 - 1987 Law Firm- Jette, Ollinger, & Grossman
San Jose, Ca.

Attorney at Law

Managing partner in the general practice of law drafting legal documents and litigation including Estate Planning, Estate Administration matters together with Estate Tax Planning.

Key Achievements:

- Grew the firm to one million (1M) in annual revenues.
- Published California State Appellate Court Case

EDUCATION:

Doctorate of Law: Pepperdine University - Malibu, California - 1979
Bachelor's Degree: Santa Clara University – Santa Clara, California

Bachelor's Degree of Science - 1976