

Trent B. Williams

FINANCIAL SERVICES SENIOR EXECUTIVE

Highly accomplished visionary Executive with 20+ years expertise providing effective operational oversight and organizational leadership, and directing and organizing change management, talent management, performance management and senior management development while creating a culture of high-performance and turning vision and strategy into bottom line results. Executive presence and ability to build followership. Fast learner who is agile to change. Proficient at board and executive management relationships and ability to work within all levels of the organization.

A dynamic and personable leader and strategist with solid business acumen and problem-solving talents, possessing robust work ethic and integrity; proficient in delivering measurable increased shareholder value and market leadership through business, financial and market development processes and strategies and combine strategic and tactical expertise to develop high performing teams.

Display unparalleled interpersonal, communication and organizational skills; able to engage and inspire workforce to deliver phenomenal results. Strive for organic revenue growth and profitability through relationship retention and expansion and drive new client acquisition while driving sustained business performance, influencing key factors and positioning businesses for scalability and success.

AREAS OF EXPERTISE

Financial Oversight ♦ Risk Management ♦ Results Focused ♦ Forecasting ♦ Creative Problem Solving
Manages Ambiguity ♦ Leading Change ♦ Revenue Growth Generation ♦ Complex Negotiations
Territory Expansion ♦ Budget Planning & Development ♦ Navigates Networks ♦ Strategic Vision
Creates Value for Clients ♦ Aligns Execution ♦ Manages Conflict ♦ General Management ♦ P&L Management
Customer Satisfaction & Retention ♦ Training & Development ♦ Manages and Develops Leaders
Situational Adaptability ♦ Cross-Functional Leadership ♦ Collaborator & Convener

CAREER EXPERIENCE

Triumph Consulting Services

Senior Financial Services Executive, February 2017 - Present

Advise small financial services firms on various aspects of revenue generation, team engagement, building internal partnerships with key stakeholders and the most effective ways to transition customers to a Wealth Management platform from their retail channel, while maintaining a focus on delivering customer excellence. Advise small to midsize financial services companies on new or expanding existing services. Advise investors on obtaining commercial bank financing for large-scale projects. Work with private companies on obtaining operational efficiencies. Research industry leaders and track industry trends. Provide consulting as an Executive Mentor. Professional Recruiting in the Banking Industry for high-level sales positions. Actively volunteer on boards and in the community.

The Harbor Bank of Maryland, Baltimore, MD

EVP Chief Administrative Officer, 2015 - 2016

Provided executive-level leadership and operational oversight across revenue-generating departments including Branch Administration, Commercial Lending and Retail Lending, Private Banking and Business Banking, Risk Management, and credit quality. Oversaw 60% of the organization's human capital and effectively directed team of Senior Vice Presidents. Developed and implemented the strategy for improving customer service across the organization. Skilled at working with competing priorities. Directly involved in helping formulate the bank's three-year strategic plan. Managed a team of senior managers.

Key Contributions:

- ◆ Initiated key strategies, launched new products, drove business development and enterprise expansion resulting in the **on-going sustainability and profitability of the bank. Helped develop 3-year strategic plan along with CEO and CFO.**
- ◆ **Created a vision focused on customer excellence and enriched the customer experience** by collaborating with line of business leaders and establishing innovative methods and processes to ensure customer satisfaction while delivering first-class service.
- ◆ Spearheaded transition and **drove the bank's culture from a service organization to a profit-generating sales and service organization** thus ensuring continued growth and success of the bank. All while improving customer service.
- ◆ **Increased commercial loan production by 40%, and further developed and grew both retail and business customers** by exploring new business opportunities, promoting benefits of services, and effectively securing new business and retail prospects.
- ◆ Proven track record of exceeding goals and deadlines with a focus on the bottom line.
- ◆ **Improved retention rate and raised employee morale and engagement** by establishing team building events, conducting performance reviews, defining expectations for associates, encouraging employee progression and promoting from within.

Wells Fargo Wealth Management, Baltimore, MD
Regional Director Wealth Management, 2009 - 2014

Directed and orchestrated operations of The Private Bank team comprising of Private Bankers, Financial Advisors, Portfolio Managers, Trust and Fiduciary Specialists, Wealth Advisors and Financial Planning Strategists. Proven ability to work under pressure. Guided and motivated business department heads to consistently achieve and surpass growth targets and expectations.

Key Contributions:

- ◆ **Intensified productivity, enhanced workflows and efficiency, and boosted business development and sales activities**, by performing as Change agent and effectively leading team of 64 key personnel through a complete departmental restructure.
- ◆ Recruited talented personnel and **successfully developed a top-performing and diverse team of employees, effective at delivering exceptional results.**
- ◆ **Heightened market presence and elevated market share** by driving the launch of two new branches in Annapolis and Hunt Valley. **Led an business unit with \$439MM in assets and \$572MM in liabilities.**
- ◆ Introduced new sales processes, which **optimized productivity and resulted in 147% increase in assets under management, 238% increase in loans, and 172% increase in deposits.**
- ◆ Conceptualized and implemented radical growth strategies and identified, negotiated, and secured innovative business opportunities all of which **produced a 292% growth in revenue.**
- ◆ In collaboration with direct reports, including five Senior Vice Presidents, continually strove for customer excellence and satisfaction by **initiating a holistic wealth management approach to client relationships, which strengthened client retention.**

Wells Fargo (Wachovia Bank) Wealth Management, Baltimore, MD
Northeast Director Wealth Management, 2007 - 2009

Accountable for territory growth and expansion across six offices in the Mid-Atlantic and Northeast regions and proficiently oversaw operations of six Senior Vice President, Private Bank Regional Directors. Functioned as the COO for the region with the support of dedicated CFO, Director of HR, and Director of Marketing reporting directly to me. Aligned resources and lead projects to completion. In conjunction with senior leadership performed SWOT analysis as part of regular coaching sessions.

Key Contributions:

- ◆ **Amplified revenue development by 13% year-over-year and generated a remarkable 164% growth in deposits, and 200% in loans**, by establishing a culture of high performance and encouraging greater sales execution throughout offices in the Mid-Atlantic and Northeast regions.
- ◆ **Led an operation consisting of 118 employees, \$1.4B in assets, \$1.7B in liabilities, and \$650k expense budget.**
- ◆ **Cultivated solid and mutually beneficial internal and external partnerships** through strategic collaboration with civic, business and non-profit leaders throughout the region, and identifying and securing prospects.

- ♦ Defined goal-setting criteria and established innovative measurements of accountability, which **resulted in a significant growth in sales results**.
- ♦ Aggressively directed and organized recruiting efforts, which **dramatically escalated new client acquisitions**.
- ♦ Executed stringent cost controls, determined overhead budgeting, and formulated operational and budgetary efficiencies all of which **ensured sustainable profitability organization-wide**.

Bank of America, Baltimore, MD

Premier Banking Market Manager, 1998 - 2007

Led Wealth Management operations within the Greater Maryland area and drove team of Client Managers to excel and deliver strong overall performance while achieving sales, client retention and organic growth objectives; constantly accomplished P&L management targets. Served as the face of the organization for the region.

Key Contributions:

- ♦ **Broadened market share and maximized profitability** by expanding operations and increasing locations from two offices to four offices.
- ♦ Due to exceptional skills and abilities **acknowledged as the second highest revenue producing market within the division**.
- ♦ **Secured top-performing talent, increasing Client Managers from four to 24** by overseeing multi-year regional expansion processes while implementing groundbreaking recruiting strategies.
- ♦ Collaborated with Banc of America Investments leadership and **created lucrative partnerships by teaming Client Managers with Investment Advisors and establishing competitive advantage while acquiring new business**.

ADDITIONAL EXPERIENCE

Premier Banking Market Manager | 1995 - 1998 | Bank of America, Newport News, Newport, VA

Premier Banking Client Manager | 1993 - 1995 | Bank of America, Newport News, Newport, VA

Banking Center Manager | 1987 - 1993 | Bank of America, Norfolk, VA

EDUCATION AND CREDENTIALS

Bachelor of Arts, Biology

University of Virginia – Charlottesville, VA

PROFESSIONAL DEVELOPMENT

Omega Courses: Credit Training ♦ Coach the Coaches ♦ Negotiating Styles and Skills ♦ Customer Excellence

LICENSES

FINRA Series 7, 63 & 24 licenses (expired February 2017)

COMMUNITY INVOLVEMENT

Baltimore Regional Housing Partnership Board and Chair of Finance Committee (2016 – Present)

Sigma Pi Phi Fraternity, Inc.; Member of the Executive Committee (2014 – Present)

United Way Finance Committee Member and Volunteer (2011 - 2019)

Living Classrooms Foundation Trustee and Finance Committee Member (2010 - 2018)

United Way Board of Directors (2010 – 2016)