Sandy S. Sanderson

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Wealth Management Executive with 20+ Years of Industry Experience

Professional Profile

A self-directed, solutions-focused, and performance-oriented banking professional contributing diverse industry experience working with high net worth clients in asset management, trust administration, and financial/estate planning. Proven ability to function in a dynamic and changing environment and improve operations, impact business growth, and maximize profitability. Maintain up-to-date knowledge of industry and governmental policies and regulations. Strong qualifications in training and development, team building, leadership, client retention/growth, and vendor relations. Effective motivator and mentor with outstanding communication and negotiation skills. Articulate and creative problem solver serving as liaison to executive management, key internal/external stakeholders, staff, and clients. Exceptional organizational, technical, and analytical skills.

Core Competencies

- ***Estate Planning***
- ***Relationship Management***
- ***New Business Development***
- ***Employee Supervision***
- ***Client Retention***
- ***Resource Allocation***
- ***Asset Management***
- ***Trust Administration***
- ***Financial Planning***
- ***Strategic/Market Analysis***
- ***Key Account Management***
- ***Team Development***
- ***Investment Allocation***
- ***Revenue Enhancement/Growth***
- ***Regulatory Compliance***
- ***Risk Management***
- ***Referral/Lead Generation***
- ***Community Outreach***

Professional Experience

ABC Trust Bank | **San Diego, CA** | **Mar. 2005 - Present**

Vice President and Manager of Administration

- Worked directly with largest, most complex clients; provided and administered investment portfolio management, financial planning, and trust administration; coordinated and oversaw entire client relationship; monitored changing client investments/financial objectives and periodically re-evaluated clients' needs.
- Collaborated with private banking, commercial lending, and other bank advisors/departments; provided complex and customized investment strategies for a select group of individuals, families, businesses, endowments, foundations, and other institutions; worked with various product specialist and ensured an integrated and seamless approach.
- Developed, expanded, and administered relationships with existing and potential Wealth Management clients.
- Identified, generated, and managed new business opportunities and ensured an exceptional client experience by setting appropriate expectations.
- Provided expert counsel to clients, guaranteed a consistently high level of service, achieved bank profitability, and exceeded fiduciary standards.
- Led, trained, and directed Relationship Managers and Assistants; served as professional mentor.
- Maintained proficiency of current bank systems and software applications.

Results/ Accomplishments:

- Consistently exceeded the highest production goals of the department; made significant contributions to divisional quotas.
- Selected to participate along with four (4) colleagues on the Senior Management Staff for the Wealth Management Division.
- Appointed to the Trust Committee; reported directly to the Board of Directors regarding any divisional administrative issues.

PROFESSIONAL EXPERIENCE (CONTINUED)

A & B, LLP **Los Angeles, CA** **Jan. 2002 – Mar. 2005**

Senior Trust Client Service Administrator

- Primary client service contact for over two hundred sixty (260) trust clients; comprised of sixteen (16) families and various stand-alone accounts; focused on complex and sophisticated estate planning techniques and tools.
- Mastered nuances of specific family relationships; utilized integrated delivery of a broad range of products/services including financial planning, asset management, personal trust, and estate planning.
- Coordinated multiple investment managers, limited partnerships, and other non-traditional investment vehicles.
- Provided centralized communication for all interested parties in servicing said relationship – from individual trustees to multiple investment agencies to specific family members.
- Instituted centralized reporting functions for over thirty five (35) custodial and investment interests relating to all of the family's assets.
- Instrumental on Business Readiness team; reviewed and implemented workflows in anticipation of conversion to new core trust accounting system.
- Contributed to the development of procedure manual including best practices industry research.
- Collaborated with front-line managers of SEI conversion teams; ensured viability of said practices and procedures.

Results/ Accomplishments:

- Senior contact for Private Client Group's highest net worth family relationship valued at over $100 million.

Global Advisors Company **Boston, MA** **Dec. 1990 – May 2001**

Senior Client Service Officer/Team Leader

- Primary Client Relationship Officer for the administration and investment allocation of over four hundred and fifty (450) trust accounts with assets valued at $158 million.
- Forged and sustained excellent working relationships with various service specialists.
- Leveraged existing account relationships with additional business opportunities; executed sales presentations for supplementary products/services.
- Managed a team of eight (8) including four (4) Senior Client Service Officers and four (4) Client Service Associates; handled annual performance reviews, promotions, salary increases, and mentoring.
- Resolved issues related to impediments of product delivery and client satisfaction and recommended action plans; reported directly to Executive Director.

Results/ Accomplishments:

- Received four (4) promotions throughout company tenure: Senior Trust Administrator to Principal Client Service Officer to Principal Operations Manager to Principal Trust Transition Manager to Senior Client Service Officer/Team Leader.
- Developed relationships between internal and external brokers, mutual fund. And rival bank operations areas which resulted in the successful transition of $255 million in assets funding over five hundred (500) trust accounts and four (4) Gift Annuity Funds with more than three thousand (3,000) participants.
- Provided relationship management and acted as primary client service contact for key, west coast client with over $80 million in assets comprised of multiple charitable trust accounts, gift annuity program; and pooled income fund.

EDUCATION/ADVANCED TRAINING

University of San Francisco, San Francisco, California
Bachelor of Science in Organizational Behavior

American Bankers Association National Graduate Trust School
Two-Year Wealth Management Program

References furnished upon request