

Cory M. Jakobson

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Professional Experience

April 2013- present

Vice President – Middle Market, Commercial Relationship Manager

Washington Trust Bank

- 17mm in new commercial credits
- Top new customer acquisition officer in commercial banking group
- 6th bankwide in return on relationship metric

Primary Role: Source Commercial Banking clients in the Middle Market, focused on customers with gross revenue in excess of 10 million. Review and write full length credit presentations, close and manage the ongoing customer needs. Lending approval authority up to \$500,000.

Accomplishments: Produced over \$17MM in commercial credits in a one year period. In addition to loans obtained over \$3MM in deposits. Top Treasury Management products per customer referrer.

Relied on easily duplicated sales process to reach a new market and achieve portfolio growth with zero charge offs and no lates. payments

Dec. 2010- April 2013

Assistant Vice President/ Business Banker, Commercial Relationship Manager

Zions Bank – Western Idaho Region

Primary Role: Source business clients through marketing. Also, analyze and close commercial credits. Service the portfolio on an ongoing basis

Accomplishments

Top Producer in all of Zions First National Bank Western Idaho Region. Created portfolio volume of over 7mm in 2012 with an additional 5mm referred. Zero charge offs or late payments.

Created a sales process that can be easily duplicated in the bank, the results of that process are:

- 7mm in new commercial loan production
- 62 Treasury Management Referrals (top in the region)
- 19 Private Service referrals (top in the region)
- nearly 1mm in deposits
- 40 business credit cards (top in the region)
- \$78,000 in insurance premiums (top in the region)
- Grew a portfolio of \$0 in SVA to nearly \$70,000 in SVA in one year
- Sourced and originated 20 new relationships to the bank and 33 new loans
- Asked to be the new commercial client development “coach” for 2013

Apr. 2010- Dec 2011

Assistant Vice President/ Specialty Banking Officer

Zions Bank – Western Idaho Region

Primary Role: Develop a marketing strategy to successfully work with officers in the region to deepen existing relationships while developing new opportunities.

Build sales teams with Branch Manager, Retail and Commercial staff. Drive sales growth through coaching and implementation of sales strategy with all levels of retail and commercial employees. In addition partner with investment, treasury management and private services to create a sales team to further reach the goals of the region.

Accomplishments

-Developed the Specialty Banking department in Idaho to be the highest producing region in the bank. This included the most insurance sales and 401k sales.

Nov 2008- Nov 2011

Owner/ Managing Member

J2 Recovery Services, LLC

Primary Role: Started a vehicle Repossession company in Idaho from nothing to the second largest company in the state. The company included five employees which I managed.

Accomplishments

- Developed a sales process that was implemented to increase sales of employees that resulted in the sale of the company after three years.

2004 – Apr 2010

Construction and Residential Loan Originator/Manager

American Pacific Mortgage Company/Diversified Mortgage Group – Boise, ID

Accomplishments

- Top producer at Diversified Mortgage Group 2006-2009. Top 25
-Producer with parent bank American Pacific Mortgage as recently as March 2010.
-Successfully originated over twelve million dollars a year in construction and residential mortgages each of the last four years

-Implemented an easily replicated marketing system and calling process that results in higher call success.
-Oversaw and responsible for production goals for a team of mortgage originators

2001-2004

Licensed Personal Financial Representative

Washington Mutual Bank – Boise, ID

Accomplishments

-Consistently top 3 in region and top 5 in group mortgage production.
-Helped to move branch production from the bottom to number 2 in the region.

Education and Professional Licenses

Master of Business Administration - Finance

Boise State University

_ Full time program with the AACSB accreditation

Bachelor of Business Administration - Economics

Boise State University

ZionsBancorp Credit Foundations—Formal Credit Training