

RESUME

JAMES A. BOYD

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PROFILE

A dedicated trust, sales and management professional with extensive trust management, sales, and consulting experience. The highlights of his career are:

- ◆ Sustained growth and profitability of current trust organization
- ◆ Turnarounds of seven other trust organizations -from near closure to profitability.
- ◆ Key member of three-man team that created a highly acclaimed Trust Management School and permanent faculty member of that school.
- ◆ Successful completions of consulting assignments for over 1,600 trust organizations in 42 states.
- ◆ Designed and authored BAI's unique self-study course in trust administration, operations, investment and management.
- ◆ Created sales programs customized to specific markets.
- ◆ Acclaimed sales trainer and sales manager.

As stated in an article in *Trust News* during his initial banking career, "Under Boyd's direction his trust department has gained national recognition by designing and instituting practices considered innovative, creative and unusual in this industry."

PROFESSIONAL EXPERIENCE

BANCO POPULAR, ILLINOIS, CHICAGO, IL

Senior Vice President and Director of Trust

12/95 to Present

Trust manager and member of bank executive committee. Hired to create a sales and service culture in a stagnant trust organization. Increased gross revenue from \$1.4 million to \$2.5 million with net profits also increasing from \$500,000 to \$850,000; average net-to-gross return of 43% on direct expenses. Annual sales increased from \$80,000 to \$250,000; personal production averaged \$60,000 per year. In process of establishing trust departments in Banco locations in New York, Florida and California.

ROBERT H. FRANKE & ASSOCIATES, INC., INVERNESS, IL

Senior Vice President

1986 to 12/95

Trust management, service delivery, sales, incentive compensation and technical expert. Completed over 1,500 consulting assignments. Skilled in turnaround projects. Directed the creation of twelve trust organizations (trust departments and pure trust companies) in seven states. Assisted 50 community bank trust organizations in doubling gross income (starting at \$500,000 to \$2,000,000) in five years or less, with average net profit margins of 25% to 35%.

FIDUCIARY SERVICES INC., INVERNESS, IL

President

1980 to 12/95

Trust industry consultant. Successfully rehabilitated five trust departments that were about to be closed up by various regulators; assignments took six to thirty months to complete. Became acknowledged nationally as one of the leading consultants to the S&L industry in the area of exercising trust powers under deregulation. Designed and marketed a computerized land trust accounting and document control system. Engaged by several CPA firms to assist their clients with various tax planning matters, corporate reorganizations, mergers and employee benefit plan design. Merged company with Robert H. Franke & Associates in 1986.

CONTINENTAL ILLINOIS NATIONAL BANK, CHICAGO, IL; PIONEER BANK & TRUST COMPANY, CHICAGO, IL; BEVERLY BANK, CHICAGO, IL

1963 TO 1980

Held trust administrative and management positions of increasing responsibility for three Chicago trust organizations. Administered probate estates, personal trusts, agencies, retirement plans, corporate trusts, and land trusts. Managed a staff of 23 at Beverly Bank. Frequently led sales production among administrators, averaging \$70,000 annually in new fees. Chaired three data processing conversion teams. Designed an early form of agency trust that was granted copyright and trademark registration.

OTHER PROFESSIONAL ACTIVITIES

- ◆ Member of Chicago Estate Planning Council.
- ◆ Served on Corporate Fiduciaries Association Legislation, Probate, tax and Personal Trust Committees.
- ◆ Serve on National Advisory Board of Federated Investors.
- ◆ Founding Director of Indiana Land Trust Council.
- ◆ Author of several articles for *Trust & Estates* magazine and other professional journals.
- ◆ Presenter and Keynote Speaker at several states trust conferences.
- ◆ Frequent lecturer at tax, estate planning and financial management seminars.

EDUCATION

Undergraduate

University of Illinois, Champaign (Engineering)
Roosevelt University, Chicago, IL, BA (Political Science)

Graduate

De Paul University, College of Law
Roosevelt University, MBA courses in economics, finance and accounting

Additional Education

Approximately 150 courses, seminars and workshops on trust, tax and related topics sponsored by Miami University School of Law, New York University School of Law, Notre Dame School of Law, and the Illinois Institute for Continuing Legal Education.

References Furnished Upon Request