

WILLIAMS D. BRACK

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EXPERIENCE

CBIZ MHM

Manager of Business Development

- Established and develop relationships with CEOs and CFOs with companies of all sizes, up to approximately \$2 billion
- Helped solve complex financial services issues regarding tax, audit, accounting, benefits, and insurance by utilizing internal partners to address client needs.
- Created New client relationships and revenue of \$400,000+

Regions Bank

VP, Community Development Manger

- Lead the bank's efforts in obtaining a satisfactory grade with the Community Reinvestment Act
- Develop and expand external relationships through outreach with local, state and regional Community Development organizations focusing on affordable housing, small business development, neighborhood revitalization and stabilization, disaster recovery and essential services for low- and moderate-income individuals and families.
- Enhance business relationships by partnering with Market Executives and Business Groups to leverage opportunities in CRA Lending, Investment and Service for the bank
- Serve as a subject matter expert for Market Executives, Business Groups and Community Affairs on community issues and organizations and provide advice and guidance
- Provide annual CRA training

VP, Commercial Relationship Manager III

- Identifies, prioritizes and develops relationship strategy for high-value retention, expansion clients and acquisition targets with revenues between \$25 million and \$250 million
- Delivers knowledgeable advice and solutions, institutionalizes client relationships, and optimizes revenue opportunities to the Commercial Bank
- Isolates current and emerging client needs and proactively introduces solutions
- Engages relevant business partners in team-based portfolio development and expertise delivery
- Plans and executes quality client/prospect calls
- Manages transaction processes from initial engagement through final close, including structure, pricing, internal approval / compliance processes and documentation
- Exercises high degree of credit acumen and pricing discipline

First Tennessee Bank – Business Credit (Asset Based Lending)

Business Development Officer

- Identify, develop and close new business opportunities with companies producing revenues between \$25 million to \$500 million.
- Understand the customers' industry, business cycles, competitive advantage, management, financials and business strategy to determine the risks of pursuing a banking relationship
- Recognize and understand risk/return and establish and negotiate the terms under which credit will be extended to include pricing, fees, cost repayment method and schedule, collateral requirements, etc.

WILLIAMS D. BRACK

- Develop and convert relationships with private equity groups, hedge funds and commercial lenders in the northeast corridor between Washington, D.C. and Boston
- Write and present credit memos to underwriting team and credit partners

NORTHWESTERN MUTUAL

Wealth Manager

- Top 5% in sales
- Helped high net worth individuals and small businesses achieve their financial goals
- Grew financial planning business from 5 initial leads to approximately 500 relationships
- Acquired Series 66 and Series 7

EDUCATION

MOREHOUSE COLLEGE

Bachelors of Business Administration Concentration: Finance

COMMUNITY & CIVIC

Downtown Memphis Commission (DMC)

Board member and Treasurer

BLDG Memphis

Board member

Mississippi Delta Academies (Leflore Legacy Academy)

Board member

Leadership Memphis

Board Member

Young Wallstreet Traders

Board Member

Leadership Memphis

Executive Class 2022 Graduate

New Memphis

A19 Graduate

Grindset Podcast

Host