

# Jeri Le Henry

9393 143<sup>rd</sup> Avenue  
Indianola, Iowa 50125

515-962-0125 (Home)  
515-556-2688 (Cell)

---

## **Executive Profile:**

Twenty five years of leadership experience expanding sales and support teams within a dynamic financial institution. Expertise in prioritizing and managing multiple projects simultaneously. Proven leadership and mentoring skills for multi level staff environments. Ability to consistently meet or exceed deadlines. Strong business development and relationship management skills. Contributed innovatively on committees, service boards and project teams. Analyzed risk, profitability, and efficiency for various corporate challenges.

## **Areas of Expertise**

Strategic Planning ■ Budgeting ■ Prospecting ■ Demonstrative Leadership  
Risk Management ■ Regulatory Compliance ■ Conversions ■ Policies & Procedures  
Workflow Analysis ■ Corporate Coaching ■ Staff Development

## **Career Highlights:**

|  |                 |
|--|-----------------|
| Director of Institutional Trust Services, Middle Office and Trust Operations Services<br>Bankers Trust Company, Des Moines, IA | 1984 to Current |
|--|-----------------|

Promoted to Director of Institutional Trust Services, Middle Office, and Trust Operations Services in 2004. Current responsibilities include generation of \$3.5 million in revenue annually, control combined expense budgets of \$2.4 million, and custody \$22 Billion in trust assets. Oversee six technology platforms, with oversight of upgrades, programming, conversions and contract negotiations with multiple vendors. Lead the sales process for Public Funds and Corporate Trust, identify potential prospects, develop requests for proposals, make presentations to selection committees, and interact directly with customers and prospects to ensure service levels meet their expectations. Design and implement annual control objectives for the SOC I audit, monitor procedures to insure compliance with published results. Develop Strategic Plans for Corporate Trust, Custody, Public Funds, Middle Office and Trust Operations and receive approval from Senior Management, implement plans and track results for target projections. Personnel management for three core departments within Bankers Trust Company, oversee hiring, coaching, training, advancement and discipline. Budgeting for three business lines with monthly monitoring for variance reporting.

|                                      |
|--------------------------------------|
| Named Public Funds Manager May 2003. |
|--------------------------------------|

Responsible for the start up for this new business line. Recruited, hired, trained staff members from zero to six to manage a money fund call center for multiple states. Interviewed vendor partners, established workflow processes, electronic file transfers, and negotiated service fee arrangements. Established ACH agreements with multiple financial institutions and state agencies for tax payment deposits. Hired and managed programmers that designed an interactive Web trading platform, tested and implemented systems in three states for six money market funds

and three fixed term funds. Established over 2500 Certificate of Deposit relationships with various banks throughout the United States. Designed customer reporting platform that includes daily confirms, reconciliation reporting, data and graphical statements. Managed three conversions in three separate states with the largest fund being completed in 21 business days. Current annual revenue \$1.5 Million.

Named Manager of Corporate Trust Services in October 2001.

Built staff from one administrative assistant to a team of five within three years; lead by an attorney and three officers. Doubled revenues in five years. Control over 90% of the Iowa market in debt issues. Expanded to fourteen other states and opened Nebraska location in 2010 that grew revenue from zero to \$250,000 currently.

Hired as Trust Operations Fee Clerk May 1984. Promoted to Trust Operations Manager July 1988

Began career as fee clerk in Trust Operations, promoted to lead worker within first year and Assistant Manager in 1986, and in July 1988 promoted to Trust Operations Manager. Lead the team through system conversions in 1985, 1989, 1998, 2000 and 2003 for core trust, bond processing and recordkeeping systems. Consistently trained staff, developed strong procedures, redefined workflow processes, and established strong working relationships with vendor partners, administrative teams and customers. Worked on various teams throughout the organization to build interfaces to bank networks, general ledger, and wire/ACH systems. Developed business interruption plans, risk management matrix, compliance tracking systems, and management reporting performance standards.

#### Professional Achievements:

Management Committee Member Bankers Trust Company  
Executive board member of Trustware Users Group  
President of Trustware Users Group  
Advisory Board Member for Northern Trust Company Custodial Services  
Past President of American Cancer Society  
Past President of Miss America Scholarship Program  
Past Chairperson of Indianola High School Parent Association  
Past Treasurer Iowa Jobs for America Graduates

#### Educational Achievements:

BA Degree Journalism, Grace College, Omaha, NE May 1978  
Certified Securities Professional, July 1989  
Certified Trust Operations Specialists, August 2001  
Public Speaking and Written Communication Instructor for AIB  
Trust Operations Instructor for Kansas/Nebraska Schools of Banking  
Graduate of Greater Des Moines Leadership Institute  
Graduate of Leadership Iowa Class, May 2011