

Lisa A. James
918 Larkspur Lane · St Marys, GA 31558 · (912) 674-7434
Lisaj6464@outlook.com

PROFILE

A results-oriented and fiscally responsible leader with a proven track record in the financial services industry and a deep understanding of public policy. Skilled in financial analysis, budgeting, and strategic planning, with a passion for serving the community and promoting economic growth.

EDUCATION AND PROFESSIONAL DESIGNATIONS

Jacksonville University ▪ Jacksonville, Florida – BBA Finance (Dean’s List)

Mitchell College ▪ New London, Connecticut – Public Administration

Fraternal Insurance Counselor (FIC)

ACA Marketplace Certified Agent

Life/Health/Variable Annuities License

Securities Licensed: Series 6, 63, and 26

EXPERIENCE

January 2020 to Present | City Council Member

City of St Marys, Georgia

- Led Small Business initiatives as City Council liaison for Downtown Development Authority resulting in 10% increase in downtown business growth.
- Elected by Council peers to serve as Mayor Pro Tempore three consecutive years.
- Fostered partnerships with State, Federal and local legislative offices to maximize project funding, influence policy and advocate for local community needs, served on city leadership team to negotiate Local Option Sales Tax
- Developed American Rescue Plan grant programs for City of St Marys resulting in \$360K in economic recovery funds for consumers and small businesses.
- Appointed to serve on both Georgia Municipal Association and National League of Cities Councils

October 2014 to Present | Managing Partner/Financial Representative

Modern Woodmen of America Fraternal Financial

- Own and operate Financial Services practice achieving 25% revenue and AUM growth annually by leveraging financial expertise to develop and implement growth strategies.
- Serve as mentor, training development, and team sales leader for North Florida Region
- Named 2017 Entrepreneur of the Year – Camden County Chamber of Commerce

April 2012 –September 2014 | Vice President, Banking Center Manager

Bank of America | Jacksonville, FL

- Instrumental in complete turnaround of underperforming sales team resulting in 250% Sales per Prior Year in productivity over three-month period.
- Improved year over year Operations and Risk metrics through training and process improvements
- Served as Strategic Sales Champion for Market
- Sourced residential and commercial loans with 150% year over year improvement

August 2009 – November 2012 | Vice President, Contact Center Unit Manager

Bank of America/Merrill Lynch | Wealth Management Banking Support

- Collaborated with technology and leadership teams to develop, manage, and implement plan to integrate banking and brokerage telephony support functionality including technology and business processes.
- Partnered with Human Resources team to create and execute site hiring plan including hiring, onboarding, and training of over 120 Associates.
- As Liaison to Wealth Management Bankers, built cross line business partnerships and collaborated on and executed strategic business plans which supported Sales and Service Fulfillment for Wealth Management Clients across three geographic regions.

March 2009 – August 2009 | Vice President, Market Business Development Manager

Bank of America | Jacksonville Consumer Market

- Remotely managed a team responsible for identifying and cultivating deposit and credit acquisition for the Jacksonville Consumer Market
- Complete ownership of strategic planning of Sales, Service, and Fulfillment of Small Business, and Group Banking Products for the Jacksonville Market
- Championed Market wide business analytics and reporting Initiatives.

March 2008 – March 2009 | Vice President, Regional Business Development Manager

Bank of America | North Florida Region

- Designed and executed North Florida Region Demand Generation Sales Plan “end-to-end”, including technology.
- Remotely managed ongoing training and development of team of Business Development Managers
- Responsible for maintaining analytics and reporting for Demand Generation, Small Business, and Deposit Sales

January 2006 – March 2008 | Vice President, Business Development Manager

Bank of America | Jacksonville Consumer Market

- Served as “Model” for Business Development Manager Role for Franchise wide Greenbelt, developed Group Banking/Direct Benefits Processes and grew Jacksonville Acquisition deposits by 20%. While simultaneously managing Banking Center
- Market DDA Champion Consistently at or above 120% SPPY
- As Small Business Champion, led SBA loan initiatives, developed and implemented Small Business Plan
- Managed Jacksonville Market Sales, Service and Compliance Training as Small Business Subject Matter Expert
- 128% SPPY with as much as 21% month over month increases in sales.
- Served in capacity of Consumer Market Manager for 6-week period supporting 12 Banking Centers
- Championed three Market Sales Metrics successfully.
- Sourced, developed, and created processes to capture Market sales growth opportunities from end to end.

May 2004 – March 2006 | Assistant Vice President, Banking Center Manager (multiple locations)

Bank of America | Brunswick, GA

- 2004 Award of Excellence recipient – top 10% Nationwide
- Piloted Franchise Wide Operations Process
- Instrumental in complete turnaround of underperforming sales team resulting in 270% Sales per Prior Year in productivity over three-month period.
- Designed and led South Georgia Team Building Forum to improve Associate satisfaction, Associate retention, and sales and service productivity.

AFFILIATIONS AND LEADERSHIP APPOINTMENTS

- Georgia Municipal Association: District 12 President (Current)
- Georgia Municipal Association: Board of Directors (Current)
- Georgia Municipal Association: Policy Council Member (Current)
- National League of Cities: Finance Administration and Intergovernmental Relations Committee Appointee (Current)
- National League of Cities: Race Equity and Leadership Council (Current)
- National League of Cities: Youth, Education and Families Council (Current)
- Coastal Georgia Area Community Action Authority: Chair of Executive Board of Directors (Current)
- Arlington Full-Service School: Business Liaison (Current)
- Fellowship of Christian Athletes: Chair of Board of Directors (Current)
- National Association of Financial Advisors: Member