

Commercial Banker Profile

General Information

- Describe your business model / go-to-market strategy.
 - [Click or tap here to enter text.](#)
 - Do you actively engage in new business development/acquiring new relationships?
 - [Click or tap here to enter text.](#)
 - How many relationships do you currently serve?
 - [Click or tap here to enter text.](#)
 - [Click or tap here to enter text.](#)
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Details of Product Mix, Pricing, Terms, and Revenue

- What is the total annual revenue of your business?
 - [Click or tap here to enter text.](#)
 - How are you compensated for the work you do? I.e., Salary/Bonus, Commission?
 - [Click or tap here to enter text.](#)
 - What types of businesses are your clients in?
 - [Click or tap here to enter text.](#)
 - What is the high-level mix of your book of business: (% loans and deposits)?
 - [Click or tap here to enter text.](#)
 - [Click or tap here to enter text.](#)
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Business Transition Plan

- For any of your 'highest value' relationships, do you require any specific terms or pricing? Describe below:
 - [Click or tap here to enter text.](#)
 - Regarding your 'most important' / 'highest value' relationships, are you the lead bank?
 - [Click or tap here to enter text.](#)
 - In general, do you partner with others inside your organization (private banking, etc.)?
 - [Click or tap here to enter text.](#)
 - What services do you currently provide for your clients?
 - [Click or tap here to enter text.](#)
 - What other services do you wish to provide for your clients?
 - [Click or tap here to enter text.](#)
 - Are you under any non-compete or non-solicitation agreement?
 - [Click or tap here to enter text.](#)
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This banker profile is designed to ensure four important things for you:

1. *your transition is successful*
2. *you are able to continue your business seamlessly at your new firm*
3. *you find the perfect fit*

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High-Level Transition

Business Plan / Needs to Successfully Transition your 'most important' / 'highest value' relationships

(example)

Relationship Name	Product(s)	Pricing	Revenue	Strategy or Needs to Transition the Relationship
Johnson	Deposit	3.5%	\$183,000	Intro to senior leader in first week. Need pricing at or above 3.5%
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