

JAMES E. CHURCH

DECEMBER 20TH 2015

Usbank Small Business Specialist dept.

Dear Hiring Manager,

I seen recently on our website that your department is in need for a District Small Business Specialist. I would love to express my interest with the position. I have been working with US bank for almost 7 years. I am currently in the Small Business Specialist II, position for over 1 year, with amazing results. Currently Rated Highly Effective (2), I have an outstanding Sales performance and in leadership. My work ethic has earned numerous promotions during my career and my ability to build relationships with Clients. I am Moving to Clarksville TN Jan 2016 and look forward to having an opportunity to setting up a meeting.

Some of my core strengths include, but are not limited to:

- Excellent analytical, communication, Telemarketing sales, and organizational skills.
- National Mortgage Licensing System (NMLS) Certified, Licensed California State Notary
- Highly adaptable to various timelines, expectations, and goals.
- Highly energetic and motivated to learn new skills.
- Wide knowledge of Bank Products, system and process etc.
- Referrals, sales, compliance, client relationship, instructing,
- Achieving Company set goals.

Attach is my resume which provides you a more extensive details of my accomplishments and experience. I look forward to speaking with you about our bank needs and how I may contribute to the fulfillment of your current objectives.

Given the combination of these factors , I am confident that I would quickly be considered a contributing and vital member of our US Bank company. I am an experienced employee who offers hard work from start to finish , and working overtime is never an issue .

Thank you for your time and considering my application and I am eagerly looking forward in hearing from you.

Sincerely,

James Edward Church



E-MAIL JAMES.CHURCH@USBANK.COM

343 STAMPER CIR • SUISUN CITY, CA 94585 • PHONE (707) 592-2777

JAMES E. CHURCH

OBJECTIVE

To Obtain the Small Business Specialist position within a Us Bank bank, that will allow myself to use my leading skills and sales abilities to help increase the business and surpass monthly and quarterly goals and also help the institution keep amazing customer service, and being able to expand my knowledge of referrals and sales abilities. Currently in a Small Business Specialist role for the Instore District for over 1 year experience.

EXPERIENCE

Current - 2009 Us Bank

Small Business Specialist II, Co Manager 2 - Branch Manager- Sr. Banker in Branch Banking.

- Surpassing UsBank Sales goals. Earned Annual Star Of Excellence, and Top District Performer for sales by finishing the year ranked in the top 5% of Company Standards. Earning over 8 Star of Excellence awards.
- Lead Branch employees to Top 5% of Region and Top District Performer Award, Top Credit card sales in Region for new banker.
- Exceeded Sales Performance in Investment Banking bookings over 3.5 mil during 2010, 2011, and 2014. Currently Ranked Highly Effective employee 2,
- Wide experience in development and management of small business clients Conducts extensive economic research, business research and planning, credit underwriting, credit analysis and credit administration.
- Profound knowledge of economic development practices, consensus building, conflict resolution, and sales and relationship management. Familiarity with customer service, community relations and telephone etiquette. Proficient in using MS Office software programs.
- Outstanding ability to analyze and interpret economic, financial and statistical data. Commendable ability to anticipate, interpret, and fulfill varied needs of customers, effectively Great ability to prepare and deliver effective business presentations to different types of audience, efficiently
- Reengineered the customers branch banking experience to exceed customer expectations to rank in the top 5% in Us Bank KDS Customer Satisfaction Experience. Currently 100% KDS Ranking.

2008-2009 Citi Bank

Personal Banker

- Specialize in Refinances, Purchases, Commercial loans
- Applying for a lenders agreement in principle (pre-approval)
- Assessing the market to find a mortgage loan that fits the clients needs
- Acquiring all information for 120 lenders from all clients over 50 states
- Telemarketing Sales, Collecting documents, Finishing loans under 21 days

2006-2008

Mortgage Broker- Elite Solutions // Country Wide Home Loans

- Combined over 96 Home loans funded, Prime/Subprime lending.
- Cold calling , self sourced, warm leads for new loans.
- Ensuring to stay compliant during the Mortgage crisis and home loan changes during the decline of the market.

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2006-2004 Wheel Chair Center

Rehabilitation Technician

- Custom Build High-end Power and Manuel Wheel chairs
- Modify to specs the rehab equipment for patients from Rehab technician
- Evaluated repair equipment, Installed new parts accordingly
- Instruct Patients to use oxygen, hosp beds, and rehabilitation equipment

EDUCATION

2013-2014

Kaplan Financial Education. Series 6 & 63 Studying Banker licensing program Dual role employee
National Mortgage Licensing System (NMLS) Certified,
Licensed California State Notary.

2004-2005

Solano Community College

Fairfield, Ca

General Education, Business Admin.

1998-2002

Kenwood High School

Clarksville, Tn

Graduated with Honors Diploma

Current Business Owner.

Currently running a successful business from Jan 2010 - Current which has expanded to Globally, and recent Employees from Guam, Texas, Japan, Tennessee, and 2 locations in California, expanding sales, overall growth of business and Social media outreach of 47k, Averaging 140k gross annual sales.

YTD reached over 6 figure sales,

MTPS5014
MO-742-Q7MOTIVATOR (TM)
QTD - BANKER RANKING W/I BRANCHMTMS07 07/01/15
OOLR 13:58:42COST CENTER BRCH 7779418
ISOS SMALL BUSINESS ADMIN

RNK	CENTER #	VER	SALES	POINTS
1	WILLBUR, LORI MICHELLE	9418	281	244,441
2	ORELLANA, JHONY ANTONY	9418	110	171,779
3	SCHULTZ, JESSICA ANN	9418	155	144,100
4	NORROD, BRYAN LEE	9418	130	141,354
5	BENSON, DAVID MAURICE	9418	140	135,599
6	NAZARYAN, GAGIK	9418	96	134,070
7	NORMAN, KIRSTEN ELIZABE	9418	138	131,184
8	DAVIS, BENJAMIN JAMES	9418	156	131,074
9	SARBER, DANIELLE ELIZAB	9418	173	131,024
10	DIAZ, CARLOS HUMBERTO	9418	124	130,997
11	UDELL, TARA LYNN	9418	103	124,143
* 12	CHURCH, JAMES EDWARD	9418	138	117,000
13	FUSON, MATTHEW CHARLES	9418	123	110,504
14	WIGGINS, MICHAEL SCOTT	9418	89	105,648
15	NGUYEN, JOHN THUYET	9418	92	103,361

F3=BACK F7=PGUP F8=PGDN CLEAR=EXIT

MORE +

Q3 - 1.5 mil
150 K points

Calendar - 7 in calis.
make 10-15
week

set schedule - P Managers
(implement)

MTPS5014
MO-742-Q6MOTIVATOR (TM)
QTD - BANKER RANKING W/I DIST.MTMS07 10/01/15
DNVW 12:48:18COST CENTER DIST 0008190
SMBUS TWIN CITIES SALES

RNK	CENTER #	VER	SALES	POINTS
1	WILLBUR, LORI MICHELLE	9418	202	282,313
2	SCHULTZ, JESSICA ANN	9418	137	180,827
3	ORELLANA, JHONY ANTONY	9418	105	140,652
4	CONTRERAS DE SP, KATHIA M	9418	135	138,346
5	NGUYEN, JOHN THUYET	9418	79	136,887
6	WIGGINS, MICHAEL SCOTT	9418	103	132,346
7	BENSON, DAVID MAURICE	9418	75	128,361
8	SARBER, DANIELLE ELIZAB	9418	161	122,593
* 9	CHURCH, JAMES EDWARD	9418	107	122,225
10	KRULJ, ALEKSANDAR	9418	122	112,790
11	FUSON, MATTHEW CHARLES	9418	143	110,732
12	UDELL, TARA LYNN	9418	122	98,033
13	NORROD, BRYAN LEE	9418	91	97,512
14	PALOMINO JR., SERVANDO A.	9418	75	92,067
15	MITCHELL, SHANNON FAYE	9418	106	86,518

F3=BACK F7=PGUP F8=PGDN CLEAR=EXIT

MORE +

MTPS5014
MO-742-Q6MOTIVATOR (TM)
QTD - BANKER RANKING W/I DIST.MTMS07 12/30/15
3X5L 13:20:43COST CENTER DIST 0008190
SMBUS TWIN CITIES SALES

RNK	CENTER #	VER	SALES	POINTS
1	WILLBUR, LORI MICHELLE	9418	161	244,230
2	WIGGINS, MICHAEL SCOTT	9418	177	224,296
3	ORELLANA, JHONY ANTONY	9418	116	154,343
4	FUSON, MATTHEW CHARLES	9418	106	150,029
5	NORMAN, KIRSTEN ELIZABE	9418	123	144,578
6	CONTRERAS DE SP, KATHIA M	9418	152	132,126
7	SARBER, DANIELLE ELIZAB	9418	122	126,937
8	SCHULTZ, JESSICA ANN	9418	140	122,955
9	MITCHELL, SHANNON FAYE	9418	87	107,552
10	BROWN, ASHER JASON	9418	80	104,717
11	CHURCH, JAMES EDWARD	9418	66	104,152
12	SAKHA, NICHOLAS KAREEM	9418	100	92,223
13	DIAZ, CARLOS HUMBERTO	9418	69	90,765
14	KRULJ, ALEKSANDAR	9418	79	90,105
15	ALVARADO, TONY	9418	51	89,853

F3=BACK F7=PGUP F8=PGDN CLEAR=EXIT

MORE +

2014 Performance Review

James Church

Employee ID: 398704



Job Title	Small Business Specialist 2	Manager	Christopher Riddle
Review Period	1/1/2014 to 12/31/2014	Department	ISOS SMALL BUSINESS ADMIN
Review Status	Complete	Last Updated	1/30/2015, 09:18 PM CST Christopher Riddle

Use this review to record year-round performance conversations as outlined on Lead Performance. Refer to Understanding our Performance Rating Scale to help you assess performance. View the FAQ for help using the online performance review.

Compliance

Describe the employee's adherence to the compliance and attendance objectives below.

Compliance

Comply with the U.S. Bank Code of Ethics and all Anti-Money Laundering, Bank Secrecy Act, information security and suspicious activity reporting requirements, policies and procedures; complete any required corporate and business line training in these areas; comply with any additional requirements identified for the employee's position (please describe).

Employee Comments:

Manager Comments:

James complies with all compliance guidelines as set forth.

Attendance and Punctuality

Observe scheduled or expected working hours and breaks; meet standards for work attendance; follow department and company attendance procedures and policies.

Employee Comments:

Manager Comments:

James maintains an excellent attendance record, follows all guidelines related to wage laws.

Performance Goals

Click the Add Goal button to create a new performance goal. To edit a goal, click the pencil icon to the right of that goal.

Set Goals

Manager: Enter the date of the goal-setting conversation.

Date

Mid-Year Goals Review

Manager: Enter the date of the mid-year goals review conversation.

Date

Compliance/Operation Performance (Through November 16th - Prior to SBS Role)

Ability to lead the team in meeting Compliance/Operational Standard (RQA, Losses, Cash Tracker, CLLO)

Employee Comments:

2014 Performance Review

James Church

Employee ID: 398704



Manager Comments:

Compliance/Operation Performance

Ability to lead the team in meeting Compliance/Operational Standard (RQA, Losses, Cash Tracker, CLLO)

RQA Plan: A

2014 Actual: A

YTD Losses to Plan: 100% or under

2014 Actual: 160% over Plan

YTD Cash Tracker Plan: 80% higher

2014 Actual: 91%

CLLO Plan: 0

2014 Actual: 0

Rating: 2 - Highly Effective

Sales & Revenue Categories (Through November 16th - Prior to SBS Role)

Comments from Nancy Cook

Employee Comments:

Manager Comments:

DDA Production & Net DDA

Ability to lead the team in DDA production and manage the retention of DDA in the branch (Net DDA).

2014 Cons. & Bus. Production Goal: 78 & 10 Gross Quarterly = 312 & 40

2014 Actual: Q1: 114 & 6, Q2: 88 & 11, Q3: 99 & 14, Q4: 86 & 7 = 387 & 38 (124% over Plan & 95% to Plan)

2014 Cons. & Bus. NET DDA Goal: Q1: 15 & 3, Q2: 23 & 3, Q3: 15 & 3, Q4: 23 & 3 = 76 & 12

2014 Actual: Q1: 30 & 4, Q2: 19 & 2, Q3: 17 & 7, Q4: 21 & 1 = 87 & 14 (115% over Plan & 117 over Plan)

Loan Production and Balance Growth

Ability to lead the team in loan booking and loan growth to meet branch loan plan.

2014 Loan Production Goal: \$520K quarterly = \$2,080,000 Total

2014 Actual: Q1: \$595,793. Q2: \$268,649. Q3: \$135,102. Q4: \$726,557. = \$1,726,101 (83% to Plan)

2014 Balance Growth Goal: \$150K quarterly = \$600K Annual Growth

2014 Actual: Q1: -\$62,626. Q2: \$372,465. Q3: -\$273,782. Q4: \$61,591 = \$97,648 (17% to Plan)

Consumer and Business Credit Card Production

Ability to lead the team in meeting branch Project ReDe goal.

2014 Cons. and Bus goals: 51 & 3 quarterly = 204 & 12 annually

2014 Actual: Q1: 42 & 4, Q4: 65 & 5, Q3: 57 & 6, Q4: 35 & 3 = 199 & 18 (98% to plan & 150% over plan)

Production Points

Ability to lead the team in meeting the branch production point goal.

2014 Goal: Q1: 68,033. Q2: 85,000. Q3: 78,280. Q4: 89,336 = 320,649

2014 Actual: Q1: 88,300. Q2: 68,260. Q3: 83,087. Q4: 83,086 = 322,733 (101% over Plan)

Revenue

2014 Performance Review

James Church

Employee ID: 398704



Ability to lead the team in generating revenue to meet the branch revenue goal.

2014 Goal: Q1: \$96,093. Q2: \$101,654. Q3: \$107,939. Q4: \$108,193 = \$413,879

2014 Actual: Q1: \$93,357. Q2: \$105,056. Q3: \$106,995. Q4: \$101,542 = \$406,950 (98% to Plan)

Key Driver Score

Ability to lead the team in creating best in class customer experience via Gallup Survey scoring (KDS).

2014 Goal: 75% Quarterly and Annually

2014 Actual: Q1: 90%, Q2: 76.7%, Q3: 100%, Q4: 90% = YTD: 89.1%

Campaign

Ability to lead the team in Campaign performances.

2014 Campaign Goal: 100% Overall

Camp USB: 115.3%

USB in the Community: 86.2%

The USBY Awards: 119.5%

SBDLC Production and Balance Growth

Ability to lead the team in Business loan booking and loan growth to meet branch loan plan.

2014 Production Goal: \$40K quarterly = \$160K Annually

2014 Actual: Q1: \$0K. Q2: \$1K. Q3: \$4K. Q4: \$0K: \$5K (3% to Plan)

2014 Balance Growth Plan: \$100K

2014 Actual: Q1: \$2.8K. Q2: -\$1.8K. Q3: -\$1.4K. Q4: \$12.7K = \$12.3K (12% to Plan)

Rating: 2 - Highly Effective

SBS Production - Q4 (11/17-12/31/14)

Employee Comments:

Manager Comments:

DDA (Min - 9 / High - 12)

Q4 - 12

Project Gold / Business Equipment Finance (Min - \$250,000 / High - \$375,000)

Q4 - \$4,000

Business Credit Cards (Min - 12 / High - 15)

Q4 - 14

Treasury Management (Min - 3 / High - 4)

Q4 - 0

Payment Solutions (Min - 3 / High - 4)

Q4 - 0

SBLC Booking / SBDLC Booking > \$100K (High - 1)

Q4 - 0

Business Banker Points (Min - 22,500 / High - 33,000)

Q4 - 7,260

Rating:



Performance Goals-Summary

Employee Comments:

Manager Comments:

James transitioned into the SBS role on November 17th, for the entire year prior to this he was an In-Store Manager. The feedback received from Nancy was nothing but positive. From reviewing the performance figures from James' roll as a Manager, he was a consistent performer in all categories.

Speaking on James' 45 days as an SBS - I have been extremely pleased with the performance that James has displayed in such a short time. It is standard for a new SBS to have a 6 month ramp-up period before goals are achieved - in the case of James, he hit the quarterly DDA and credit card goal in just half a quarter - outstanding results. Additionally, James has established an outstanding pipeline that will be carried over to 2015. Absolutely fantastic start to the SBS role, James should be extremely proud of his accomplishments in such a short period. Very excited to see the success in 2015.

Leadership Practices

Practices are essential actions demonstrated to achieve the performance goals. Refer to the Leadership Practice Actions and Standards for details. Click the Add Practice button for any additional practices specific to your business line or role.

Advocate for the Customer

Demonstrate U.S. Bank's Service Values: trust, accountability, respect, connection, collaboration and growth; develop relationships with partners to deliver exceptional experiences that drive mutual benefits for our customers and for U.S. Bank; anticipate needs; resolve customer issues accurately, creatively and promptly to build loyalty.

Employee Comments:

Manager Comments:

James performs well in this category.

Rating:

Build Relationships

Be open, speak candidly, listen actively and develop trust; interact positively with others, particularly in difficult or challenging situations; maintain a network of relationships across business lines, with customers and in the community.

Employee Comments:

Manager Comments:

Again, a testament to James' early success. His ability to develop trust amongst his partners and branches has been exceptionally impressive thus far.

Rating:

Collaborate

Create a team atmosphere and encourage members to work toward shared goals; look across the organization and make sure all voices are heard; build bridges--by communicating and reinforcing common interests, priorities and opportunities; seek and share knowledge.

2014 Performance Review

James Church

Employee ID: 398704



Employee Comments:

Manager Comments:

From Nancy Cook: James you always take the time to get to know various partners to understand what they do to then be able to bring and share the information with the team and with our customers as needed.

Rating:

Embrace Diversity & Inclusion

Engage and respect the uniqueness of everyone; understand the value of building a team with members of varying backgrounds, talents and perspectives; recognize how diversity and inclusion drive business results.

Employee Comments:

Manager Comments:

James displays these characteristics very well.

Rating:

Engage & Develop

Show the connection between work and U.S. Bank's success; create an environment that encourages others to give their best; coach others to excel; recognize the contributions, accomplishments and ideas of others; attract, develop and retain top talent.

Employee Comments:

Manager Comments:

From Nancy Cook: James our team cannot thank you enough for being a great team player and you played an integral part of making the team as success as it is. Everyone on the team has learned so much from you. You even take the time to help peers at other locations even if it is not in our district.

Rating:

Establish Trust

Act with integrity; interact with others in the most transparent and authentic way possible; live and work by the highest ethical standards; keep commitments and always follow through; walk the talk--let actions reflect the words.

Employee Comments:

Manager Comments:

James displays this value very well.

Rating:

Innovate

Challenge the status quo in constructive ways and encourage others to do the same; take an active approach to generating and recognizing new ideas and improvements to existing processes/products; use new technologies, tools and practices with a consistent focus on creating additional value for customers, employees and shareholders.

Employee Comments:

2014 Performance Review

James Church

Employee ID: 398704



Manager Comments:

This is another strong area of James. During the on-boarding process, James was extremely quick to identify processes that he wanted to implement, and has done so very well. Thank you James.

Rating:

Take Balanced Risks

Understand the culture and appetite for risk as it applies to your role; analyze and articulate all possible outcomes of any risk when making recommendations and decisions; champion prudent risks and actions when they benefit customers, employees, shareholders and communities.

Employee Comments:

Manager Comments:

No issues in this category

Rating:

Leadership Practices-Summary

Employee Comments:

Manager Comments:

James displays the excellent ability to be a leader in many of the situations that he is presented with. Moving into 2015 as an SBS, it will be integral for James to use his leadership abilities to work with the DM and have the full district focused on small business. To this point, excellent work James, very excited to see the results for 2015.

Rating: 2 - Highly Effective

Coaching and Development

Record a brief summary of your coaching and development conversations throughout the year. Use Lead Performance resources on Leading US to help you prepare. Include any action items in the comments section for each conversation.

Managers: Click Add Conversation (Optional) to record additional conversations.

Coaching and Development Conversation

Employee Comments:

Manager Comments:

Date

Coaching and Development Conversation

2014 Performance Review

James Church

Employee ID: 398704



Employee Comments:

Manager Comments:

Date

Recognition

Summarize recognition received throughout the year (e.g., other responsibilities, activities, achievements and community involvement, The Best in US etc.).

Recognition-Summary

Employee Comments:

Manager Comments:

In just a short period of time as an SBS, James has received numerous commendations for his efforts. Here are two examples of E-cards that James has received:

From Patty Baring

I mean, CAN YOU GET ANY MORE AMAZING?! Thank you for the exceptional customer service that you provide to our clients James, and for literally going ABOVE THE CALL and meeting them in person, with such promptness. My customer's LOVE the tailored service, and absolutely rave about your expertise and extensive knowledge, but more importantly, because you truly care about their financial success and work to get them there. You are in your niche, so thrive boss, thrive! I wish you success and thank you for immersing yourself in the role so seemingly flawlessly. Business is your calling, and you have set the bar high for many. It is wonderful to have a strong trust between partners, so we'll keep pitching and keep on catching! North bay hustlers haven't seen anything yet!

From: Zech Voravong

James, I also want to say you were a great pick to be an SBS and I can already see you doing so well in this field. With the short period of time and all of your training, you've still managed to create success for a lot of branches in the District including my branch. My bankers and I are very excited to partner with you this year to make 2015 a successful year around business. Just from a referral, you've turned it into a sales and we are looking forward to booking our first Equipment Financing Deal for 50K. I can see our District improving in Small Business bookings already. Keep up the great job and cheers to a successful 2015!

Overall Performance

Summarize your annual review conversation here. Managers must enter an overall rating before the review can be signed. Refer to Understanding Our Performance Rating Scale.

Annual Review

Manager: Enter the date of the annual review conversation.

Date

Overall Performance-Summary

2014 Performance Review

James Church

Employee ID: 398704



Employee Comments:

Manager Comments:

Between the two positions that James held during 2014, he demonstrated his value in each. I again would like to summarize how impressed I am with James' ability to take an initiative and run with it. With his spirit, attitude, and skill set, I have absolutely no doubt that we will be seeing great success in 2015. Thank you for what you do James.

Rating: 2 - Highly Effective

Signature Section

To complete this review at year end, both the manager and employee must electronically sign below.

Once either the employee or manager signs, no changes can be made except to add signatures. Once both the employee and manager sign, the review is complete and no further action is required.

Employee

James Church

Date: 1/30/2015, 09:14 PM CST

Manager

Christopher Riddle

Date: 1/30/2015, 09:18 PM CST

2nd Manager (Optional)

Date:

2015 Performance Review

James Church

Employee ID: 398704



Job Title	Small Business Spclst NMLS 2	Manager	Christopher Riddle
Review Period	1/1/2015 to 12/31/2015	Department	ISOS SMALL BUSINESS ADMIN
Review Status	In Progress	Last Updated	8/3/2015, 07:11 PM CST Christopher Riddle

Use this review to record year-round performance conversations as outlined on Lead Performance. Refer to Understanding our Performance Rating Scale to help you assess performance. View the FAQ for help using the online performance review.

Compliance

Describe the employee's adherence to the compliance and attendance objectives below.

Compliance

Comply with the U.S. Bank Code of Ethics and all applicable banking laws and regulations (including Anti-Money Laundering and customer treatment requirements), policies and procedures. Complete all required corporate and business line training in these areas. Comply with any additional requirements identified for the employee's position (please describe). Raise compliance issues that come to your attention. Consider compliance quality assurance testing results, internal audit and regulatory exam findings, and training completion status if applicable to the role.

Employee Comments:

Manager Comments:

Attendance and Punctuality

Observe scheduled or expected working hours and breaks; meet standards for work attendance; follow department and company attendance procedures and policies.

Employee Comments:

Manager Comments:

Performance Goals

Click the Add Goal button to create a new performance goal. To edit a goal, click the pencil icon to the right of that goal.

Set Goals

Manager: Enter the date of the goal-setting conversation.

Date

Mid-Year Goals Review

Manager: Enter the date of the mid-year goals review conversation.

Date

PRODUCT SALES (40%) --- Business Checking Accounts (8%)

20+ = (1)

15-19 = (2)

9-14 = (3)

<9 = (4)

2015 Performance Review

James Church

Employee ID: 398704



Employee Comments:

Manager Comments:

Quarter 1 - 2015

Business DDA: 18

Rating: 2

Quarter 2 - 2015

Business DDA: 30

Rating: 1

Rating: 2 - Highly Effective

PRODUCT SALES (40%) --- Lending - Cash Flow Manager, Quick Loan, Equipment Finance (25%)

\$750k + = (1)

\$500,000-\$749,999 = (2)

\$250,000-\$499,000 = (3)

< \$250,000 = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

Lending (CFM, QL, BEFG): \$287,905

Rating: 3

Quarter 2 - 2015

Lending (CFM, QL, BEFG): \$1,101,655

Rating: 1

Rating: 2 - Highly Effective

PRODUCT SALES (40%) --- Business Credit Cards (13%)

35+ = (1)

21-34 = (2)

12-20 = (3)

<12 = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

Business Credit Cards: 41

2015 Performance Review

James Church

Employee ID: 398704



Rating: 1

Quarter 2 - 2015

Business Credit Cards: 42

Rating: 1

Rating: 1 - Exceptional

PRODUCT SALES (40%) --- Treasury Management Sales (13%)

7+ = (1)

5-6 = (2)

3-4 = (3)

<3 = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

Treasury Management: 1

Rating: 4

Quarter 2 - 2015

Treasury Management: 0

Rating: 4

Rating: 4 - Needs Improvement

PRODUCT SALES (40%) --- Payment Solutions Sales (13%)

9+ = (1)

6-8 = (2)

3-5 = (3)

<3 = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

Payment Solutions: 3

Rating: 3

Quarter 2 - 2015

Payment Solutions: 7

Rating: 2

Rating: 3 - Solid Performance

2015 Performance Review

James Church

Employee ID: 398704



PRODUCT SALES (40%) --- SBLC Production (13%)

3 = (1)

2 = (2)

1 = (3)

0 = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

SBLC Production: 0

Rating: 4

Quarter 2 - 2015

SBLC Production: 0

Rating: 4

Rating: 4 - Needs Improvement

PRODUCT SALES (40%) --- Sales Points Production (15%)

80,000+ = (1)

50,000-79,999 = (2)

25,000-39,999 = (3)

<25,000 = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

Sales Points Production: 34,111

Rating: 3

Quarter 2 - 2015

Sales Points Production: 114,375

Rating: 1

Rating: 2 - Highly Effective

PORTFOLIO MANAGEMENT (20%) --- Tier Revenue Growth (50%)

120% = (1)

110% = (2)

101% = (3)

< 101% = (4)

Employee Comments:

Manager Comments:

2015 Performance Review

James Church

Employee ID: 398704



Quarter 1 - 2015

Tier Revenue Growth: 107.6%

Rating: 3

Quarter 2 - 2015

Tier Revenue Growth: 107.6%

Rating: 3

Rating: 3 - Solid Performance

PORTFOLIO MANAGEMENT (20%) --- Average Tier 2 / 3 Calling % (50%)

95% = (1)

85% = (2)

75% = (3)

<75% = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

Average Tier 2 / 3 Calling %: 33%

Rating: 4

Quarter 2 - 2015

Average Tier 2 / 3 Calling %: 49%

Rating: 4

Rating: 4 - Needs Improvement

Performance Goals-Summary

Employee Comments:

Manager Comments:

Leadership Practices

Practices are essential actions demonstrated to achieve the performance goals. Refer to the Leadership Practice Actions and Standards for details. Click the Add Practice button for any additional practices specific to your business line or role.

Advocate for the Customer

Demonstrate U.S. Bank's Service Values: trust, accountability, respect, connection, collaboration and growth; develop relationships with partners to deliver exceptional experiences that drive mutual benefits for our customers and for U.S. Bank; anticipate needs; resolve customer issues accurately,

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creatively and promptly to build loyalty.

Employee Comments:

Manager Comments:

Rating:

Build Relationships

Be open, speak candidly, listen actively and develop trust; interact positively with others, particularly in difficult or challenging situations; maintain a network of relationships across business lines, with customers and in the community.

Employee Comments:

Manager Comments:

Rating:

Collaborate

Create a team atmosphere and encourage members to work toward shared goals; look across the organization and make sure all voices are heard; build bridges—by communicating and reinforcing common interests, priorities and opportunities; seek and share knowledge.

Employee Comments:

Manager Comments:

Rating:

Embrace Diversity & Inclusion

Engage and respect the uniqueness of everyone; understand the value of building a team with members of varying backgrounds, talents and perspectives; recognize how diversity and inclusion drive business results.

Employee Comments:

Manager Comments:

Rating:

Engage & Develop

Show the connection between work and U.S. Bank's success; create an environment that encourages others to give their best; coach others to excel; recognize the contributions, accomplishments and ideas of others; attract, develop and retain top talent.

Employee Comments:

Manager Comments:

Rating:

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Establish Trust

Act with integrity; interact with others in the most transparent and authentic way possible; live and work by the highest ethical standards; keep commitments and always follow through; walk the talk--let actions reflect the words.

Employee Comments:

Manager Comments:

Rating:

Innovate

Challenge the status quo in constructive ways and encourage others to do the same; take an active approach to generating and recognizing new ideas and improvements to existing processes/products; use new technologies, tools and practices with a consistent focus on creating additional value for customers, employees and shareholders.

Employee Comments:

Manager Comments:

Rating:

Take Balanced Risks

Understand the culture and appetite for risk as it applies to your role; analyze and articulate all possible outcomes of any risk when making recommendations and decisions; champion prudent risks and actions when they benefit customers, employees, shareholders and communities.

Employee Comments:

Manager Comments:

Rating:

LEADERSHIP (20%) --- District Net DDA Performance (10%)

130% = (1)

110% = (2)

95-109% = (3)

<95% = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

District Net DDA: 33%

Rating: 4

Quarter 2 - 2015

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District Net DDA: 57%

Rating: 4

Rating: 4 - Needs Improvement

LEADERSHIP - District Payment Solutions Sales (15%)

150% = (1)

135% = (2)

95% = (3)

< 95% = (4)

Employee Comments: _____

Manager Comments: _____

Quarter 1 - 2015

District Payment Solutions: 35%

Rating: 4

Quarter 2 - 2015

District Payment Solutions: 48%

Rating: 4

Rating: 4 - Needs Improvement

LEADERSHIP (20%) --- District Business Credit Card Sales (15%)

150% = (1)

135% = (2)

95% = (3)

< 95% = (4)

Employee Comments: _____

Manager Comments: _____

Quarter 1 - 2015

District Business Credit Card: 138%

Rating: 1

Quarter 2 - 2015

District Business Credit Card: 137%

Rating: 1

Rating: 1 - Exceptional

LEADERSHIP (20%) --- District Treasury Management Sales (15%)

25 = (1)

17-24 = (2)

12-16 = (3)

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<12 = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

District Treasury Management Sales: 3
Rating: 4

Quarter 2 - 2015

District Treasury Management Sales: 0
Rating: 4

Rating: 4 - Needs Improvement

LEADERSHIP (20%) --- District Business Credit Balances to Plan (45%)

If < \$8MM

150% = (1)

121% = (2)

95 ? 119.99% = (3)

<95% = (4)

If > \$8MM

125% = (1)

110% = (2)

95 ? 109.99% = (3)

<95% = (4)

Employee Comments:

Manager Comments:

Quarter 1 - 2015

District Business Credit Balances to Plan: 104%
Rating: 3

Quarter 2 - 2015

District Business Credit Balances to Plan: 94%
Rating: 4

Rating: 4 - Needs Improvement

PARTNERSHIP (20%)

Maintains effective communication around business production within the district. Attends and presents at job family meetings and conference calls. Has an active roll in communicating best practices, referral and booking updates. Maintains a positive and open relationship with their respective District Manager.

Employee Comments:



Manager Comments:

Rating:

Leadership Practices-Summary

Employee Comments:

Manager Comments:

Coaching and Development

Record a brief summary of your coaching and development conversations throughout the year. Use Lead Performance resources on Leading US to help you prepare. Include any action items in the comments section for each conversation.

Managers: Click Add Conversation (Optional) to record additional conversations.

Coaching and Development Conversation

Employee Comments:

Manager Comments:

Date

Coaching and Development Conversation

Employee Comments:

Manager Comments:

Date

Recognition

Summarize recognition received throughout the year (e.g., other responsibilities, activities, achievements and community involvement, The Best in US etc.).

Recognition-Summary

Employee Comments:

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Manager Comments:

Overall Performance

Summarize your annual review conversation here. Managers must enter an overall rating before the review can be signed. Refer to Understanding Our Performance Rating Scale.

Annual Review

Manager: Enter the date of the annual review conversation.

Date

Overall Performance-Summary

Employee Comments:

Manager Comments:

Mid-Year Review Ratings:

Product Sales (40%) - 2.52

Portfolio Management (20%) - 3.50

Leadership (20%) - 3.25

Partnership (20%) - 2.00

Weighted Performance (Mid-Year): 2.76

Rating: 3 - Solid Performance

Signature Section

To complete this review at year end, both the manager and employee must electronically sign below.

Once either the employee or manager signs, no changes can be made except to add signatures. Once both the employee and manager sign, the review is complete and no further action is required.

Employee

Date:

Manager

Date:

2nd Manager (Optional)

Date: