



Board, Commission or Committee
Application

General Information

Name of Board, Commission or Committee: Boulder City Library

Applicant Name: Robert Yoder

Home Address: 639 Avenue F City Boulder City Zip 89005

Mailing Address: 639 Avenue F City Boulder City Zip 89005

Home Phone: [REDACTED] Cell Phone: [REDACTED]

Work Phone: [REDACTED] Fax: [REDACTED]

Email Address: [REDACTED]

Employer: City National Bank Occupation: Senior Trust Officer

Availability

Please provide the times you are available to serve on this Board/Commission/Council.

Monday - Friday 5-9pm; Saturday and Sunday 10am - 4pm additionally availability as needed with notice

Relevant Affiliations

Please list below any other committees you are currently serving on. Please list, if applicable, the jurisdiction and the term of appointment. If you were appointed by an individual and not by a local jurisdiction please include that information.

N/A

Skills and Experience

Please provide a brief description of your qualifications; include any special skills, interests, experience or training which you possess that would benefit the work of this Board, Commission or Council:

I currently am a Senior Trust Officer with City National Bank where I work with clients on wealth management, estate planning, philanthropic giving, and the administration of the personal trusts. My career has provided 12 years of professional experience serving in a fiduciary capacity managing trusts, including charitable trusts and private foundations.

Please attach a **required** resume/letter of interest.

I certify that the information provided is true and accurate to the best of my knowledge.

Signature Robert P. Yoder Date 4/19/22

You may deliver this application to the Clark County Administrative Services Department, 6th Floor, Clark County Government Center, 500 South Grand Central Parkway, or mail to the following address:

Administrative Services Department - 6th Floor Attn: Agenda Coordinator

P. O. Box 551712, Las Vegas - NV 89155-1712

(This document becomes a public record once it has been received by Clark County.)

Robert Yoder

639 Avenue F, Boulder City NV 89005



EXPERIENCE

City National Bank

08/2021 - Present

Senior Trust Officer

Las Vegas, Nevada

- Administer and interpret fiduciary accounts in accordance with applicable laws and regulations and the stipulations of governing documents, local law or Court Order under which authority is conferred.
- Interact with and provide guidance to Real Property Managers, CPAs and Trust Counsel, Portfolio Managers, Financial Advisors, Investment Advisors, and other bank colleagues.
- Oversee annual administrative review of Trust accounts.
- Comply fully with all Bank Operational and Wealth Management policies and procedures as well as all regulatory requirements

Charles Schwab Trust Company

07/17 - 08/2021

Senior Trust Officer

Henderson, Nevada

- Personally administering an assigned book of complex and high touch personal trust accounts
- Responsible for developing and maintaining relationships with Financial Consultants, internal contacts and partners, trust beneficiaries, and other interested parties for an assigned book of business
- Proactively developing, monitoring, and auditing personal trust services policies and procedures to actively maintain compliance with all governing bodies while servicing client needs within the framework of the bank's capabilities
- Identifying key areas of development across trust offering and onboarding process implementing solutions as necessary to improve client experience

Wells Fargo, N.A. Investment and Fiduciary Services

05/16 - 06/17

Senior Trust Administrator

Winston-Salem, North Carolina

- Provided specialized trust administration, services and risk management for charitable and tax exempt entities
- Administered perpetually charitable trusts classified as private foundations and supporting organizations, and charitable investment accounts in a centralized trust center environment.
- Offered fiduciary oversight handling complex issues regarding governing document interpretation monitoring risk and the client account in order to create, expand and service clients
- Partnered with relationship managers and sales specialists to develop new business, retain/expand current relationships and recommend additional services

U.S. TRUST, BANK OF AMERICA PRIVATE WEALTH MANAGEMENT

11/09 – 05/16

Trust Officer, Vice President

New York, New York

- Developed and delivered solutions to meet client needs utilizing technical fiduciary knowledge in the areas of law, tax, fiduciary investing, regulation, compliance as well as estate planning.
- Responsible for the professional administration of fiduciary accounts including compliance with all regulations, policies and procedures.
- Developed centers of influence within the professional community to cultivate a network of external referral partners
- Served as key associate on specific relationships, working with teammates to deliver integrated solutions, as appropriate
- Promoted the full breadth of the fiduciary platform (fiduciary, tax, special assets, estate settlement), both internally and externally to grow fiduciary business and actively participated in the sales process.

EDUCATION

Campbell University

May 2009

Master of Business Administration, Lundy-Fetterman School of Business

Buies Creek, North Carolina

Concentrations: Finance

Campbell University

May 2009

B.S. Business Administration, Lundy-Fetterman School of Business

Buies Creek, North Carolina

Concentrations: Trust and Wealth Management, Financial Planning

CERTIFICATIONS

Certified Trust and Financial Advisor

July 2013