

Questionnaire for Nomination to the Tremont West Development Corporation Board of Directors

Name: Jason D. Petroff Phone: 440-384-2005 (Cell) Cell: _____

Work Address: Fifth Third Private Bank 600 Superior Ave. E., A6512A, Cleveland, OH 44114

Home Address: 2214 West 20th Street Cleveland, Ohio 44113

Email: jasondpetroff@gmail.com

1. Please describe your involvement with the Tremont West Development Corporation or other Tremont clubs and activities during the last 5 years:

Since moving to Tremont in 2020, I have been actively involved as a member of the Duck Island Block Club, participating in meetings, neighborhood events like the annual clean-up day, etc. In December 2021 I was elected to serve as the Duck Island representative to the TWDC Board of Directors and have served as Ex-Officio Director since January 2022. I have also been active as a voting member of the Economic Development Committee, participate in several other activities and events throughout the year like the annual River Sweep, and continue to expand my level of involvement within the community. Prior to moving to Tremont, I was involved with the Bridge Brigade Block Club in Detroit Shoreway.
2. Please describe any involvement that you have had with charitable organizations during the last 5 years:

There are several causes and organizations that are near and dear to me. Among them are the Cleveland Food Bank and CHN, both of which I support through volunteerism. As a member of the Fifth Third Bank corporate team in Cleveland, I am a proud supporter of the \$20 million investment the Bank is making in the Buckeye neighborhood of Cleveland. Fifth Third has collaborated with Enterprise Community Partners, Cleveland Neighborhood Progress, CHN Housing Partners, and Burten, Bell, Carr Development, Inc. to provide strategic insight and investments to help support and revitalize the Buckeye neighborhood. I have been involved in volunteer opportunities through this investment partnership, which also hits close to "home" as I am a graduate of Benedictine High School, which has been firmly rooted in the Buckeye neighborhood for nearly 100 years.
3. Please describe any other memberships on boards or committees that you have had during the last 5 years (such as non-profit organizations, professional associations or city or county government):

While I have not had any direct involvement with other boards or committees over the past five years other than what has been touched on above, I have found my current involvement with the DI Block Club, ED Committee, and TWDC Board to be insightful and fulfilling, and therefore I am hopeful to continue my engagement with not only TWDC, but to also expand my involvement with non-profit organizations whose missions align with my values. My partner, Michael Rigol, Jr., serves as the City Commissioner of Stonewall Sports Cleveland, and I am proud and supportive of the work he does to help bring inclusive sports to the LGBTQIA+ community.
4. Please describe the skills and areas of expertise that you would bring to the Board of Directors of the Tremont West Development Corporation.:

I consider myself to be a passionate and driven team-player, and I possess the tenacity needed to accomplish any task to which I set my mind. I feel that I bring a unique perspective to the Board as a member of the LGBTQIA+ community, and as an individual who is passionate about building an inclusive community for all who consider Tremont home.

Having been in the financial services and investment industry for nearly 13 years, I have developed a deep understanding of the complexities of managing wealth for high-net-worth clients. This expertise has afforded me the opportunity to develop relationships with clients and other members of the accounting, wealth management, and legal world. These individuals are intimately involved in a myriad of professional and non-profit organizations across Northern Ohio, and I would be excited at the opportunity to leverage my personal and professional networks to help advance the important work of TWDC.

5: Please state why you are interested in serving on the Board of Directors for the Tremont West Development Corporation:

(The following response was crafted to serve as a response to question five and the statement that contains the information you most wish voters to consider.)

As a resident of Tremont, I feel that I bring a unique set of skills and perspective to the table, and have the drive needed to execute on the strategic initiatives of TWDC that will continue to improve the lives of Tremont residents and stakeholders. I care deeply about the community in which I live, and the City of Cleveland as a whole. Given that Duck Island is experiencing such a huge boom in development, and that the number of residents in the neighborhood will be growing by 600+ with three new apartment buildings (Waterford Bluffs, Abbey Avenue Apartments, and The Pearl), I feel that additional representation of the Duck Island Neighborhood on the TWDC Board is timely and necessary. If selected for this open Board position, it would be my privilege to serve as that voice for the residents of Duck Island and greater Tremont as the Board continues to serve and guide the community.

Membership on the TWDC Board of Directors requires a substantial commitment of time and energy. Members of the Board typically serve on one or more committees, which meet monthly, as well as the Board of Directors meeting, which also meets monthly. Typically, Board Members spend between 5 -10 hours per month on TWDC matters. Please indicate the number of hours per month that you will be available as a member of the Board of Directors: 5-10+

Please send this application, along with a current résumé and a short (not more than 75 words) statement that contains the information you most wish voters to consider to coryriordan@tremontwest.org:

As a current Tremont resident and Board member, I care deeply about Tremont, feel that I possess a unique set of skills and perspective, and have the drive needed to execute on the strategic initiatives of TWDC. Duck Island is experiencing a surge in development, and continued representation of Duck Island on the Board is important. It would be my privilege to continue serving as a voice for the residents of Duck Island and Tremont.

Many thanks, Jason

Jason D. Petroff

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Professional Profile and Summary of Qualifications-----

Proven wealth management professional with strong leadership and team building abilities, excellent communications skills with a track record of delivering results.

Education-----

John Carroll University

August 2008 – June 2010

Business Administration

Kent State University

June 2010 – December 2010

Business Administration

Professional Experience-----

Fifth Third Private Bank

November 2018 – Present

Private Bank Licensed Client Service Associate

- Member of a highly credentialed team of Wealth Management professionals that collectively manages over \$1.3 billion in assets
- Provide critical support to highest revenue producing Investment Executive within Fifth Third Securities/Fifth Third Private Bank, managing nearly \$500 million in assets
- Assist existing high and ultra-high net worth clients and prospects through a comprehensive plan-based approach, addressing all aspects of their Private Banking, Wealth Planning, Trust and Estate, Insurance, and Investment needs
- Manage operational, compliance, and risk management matters, including compliance with federal and state regulations as well as internal guidelines
- Perform new account openings, manage asset transfers, oversee trade execution, etc.
- Maintain close contact with clients and business partners to ensure they remain informed about industry and market changes while deepening relationships and serving the best interests of our clients

Fifth Third Securities

November 2018 – Present

Licensed Investment Support Specialist II

(Dual employee; please see above)

Fifth Third Private Bank

March 2017 – November 2018

Private Bank Client Service Associate II

- Provided comprehensive office management support for Private Bank team members
- Interacted directly with Private Bank clients and prospects to build effective relationships and enhance the client experience
- Responsible and accountable for risk by openly exchanging ideas and opinions, elevating concerns, and personally following policies and procedures
- Ensured that actions and behaviors drove a positive customer experience, while operating within the Bank's risk appetite

Fifth Third Bancorp/ Fifth Third Securities

July 2014 – March 2017

Personal Banker II/ Investment Representative

- Worked with clients to uncover financial needs and provide solutions
- Focused on the lending and investment needs of clients'
- Consistently exceeded monthly production goals, finishing 2016 at over 106% to goal for combined KPI and investment goals
- Ranked "Rookie of the Year" for 2014 Investment Revenue, with nearly \$40,000 in revenue in just four months of production, finishing the year at 254.8% to goal
- Consistently exceeded tenured sales production targets while working with clients to achieve their financial goals

JPMorgan Chase Bank/JPMorgan Securities LLC

February 2013 – April 2014

Private Client Banker

- Specialized in the relationship management of affluent clients with investable assets in excess of \$250,000
- Managed a multimillion-dollar book of business, acquiring nearly \$2.2 million in new investment assets and over \$3.35 million in new deposits

JPMorgan Chase Bank

February 2012 – February 2013

Relationship Banker

- Worked with clients to provide solutions to their financial needs through bank products and services
- Worked closely with business partners and referred clients to said colleagues when appropriate
- Increased my book of business by over \$1.75 million in new deposits

Fifth Third Bank

November 2010 – December 2011

Senior Customer Service Representative

- Exceeded monthly referral goals, ranking among the top performers in the region and district
- Ranked among the top ten in the Southeast region and Northeast Ohio district for referrals in the months of February and March 2011
- Ranked sixth in the Northeast Ohio district for the first quarter 2011

John Carroll University Cardinal Suenens Center

May 2008 – December 2008

Office Assistant & Coordinator

- Managed the daily operations of the center including scheduling appointments, travel arrangements and management of the centers' finances
- Worked with University faculty and staff to coordinate and plan events including seminars and lectures
- Orchestrated speaking engagements with renowned lecturers such as Sr. Helen Prejean and Uwem Akpan
- Designed and oversaw the production of brochures and advertisements, maintained the center's website, and worked with local media outlets to advertise speaking engagements

Skills/Activities-----

- FINRA Series 6, 7, 63, & 66 Licenses
- Life, Health & Variable Insurance Licenses
- State of Ohio Notary Public
- Member of the Duck Island Block Club
- Voting Member of the TWDC Economic Development Committee
- Tremont West Development Corporation Board of Directors, Ex-Officio Director