

November 15, 2021

Penn-Harris-Madison Board of School Trustees

55900 Bittersweet Rd.

Mishawaka, IN 46545

Dear P-H-M Board of School Trustees & Dr. Thacker:

Please accept my candidacy to fill the unexpired term of Mr. Jamie Woods. As my enclosed resume will indicate, I am a skilled decision-maker. I am a proven complexity buster and systems thinker. I have the ability to cut through layers of extraneous information to find and communicate the most important ideas in an unbiased method. My areas of proficiency are finance, investments, and consulting.

I am a South Bend native as well as a Penn-Harris-Madison School District parent of three. I have a long history of board service and volunteer activity that demonstrate my high level of commitment to community. Currently, I am Vice President of Investments with JPMorgan Chase Bank N.A. As a wealth management professional with over a decade of experience I have an in-depth knowledge of financial planning, and analysis of financial markets.

I understand the gravity of this candidacy, as I seek to represent our children's needs in this unprecedented time in our community. I believe that my unique perspective will benefit in the continued prioritization of learning for all children in our schools. My financial acumen would serve as a benefit in maintaining and growing the fiscal responsibility of our district's resources for that learning. Lastly, I believe that our schools should always be a safe and inviting climate for our community's most precious assets, our children; I would make that a guiding philosophy throughout my tenure.

Thank you for your consideration.

Respectfully,

A handwritten signature in black ink, appearing to read "RHS", written in a cursive style.

Robert Hyde Sr., MBA, CTFA

Robert W. Hyde

RESULTS-DRIVEN ANALYTIC STRATEGY LEADER

I am a proven complexity buster and systems thinker. I have the ability to cut through layers of extraneous information to find and communicate the most important ideas. I engage complexity by reverse-engineering its origin to reveal all parts and their connections.

Finance | Investments | Coaching | Consulting

Professional Experience

JPMorgan Chase Bank, N.A.

Elkhart, IN

Vice President Investments – Private Client Advisor

Oct 2019 – Present

Offers comprehensive financial planning and advice to individuals and families. Responsible for providing an exceptional investor experience by offering advised solutions and Chase partner referrals that deepen client relationships.

Gibson

South Bend, IN

Lead Business Advisor – Small & Medium Enterprises

Feb 2018 – July 2019

As a small-business consultant responsible for leading the Small & Medium Enterprises Advisor team, I specialize in finance strategies, management consulting, and HR & Payroll Outsourcing solutions. I work with small-business owners to assist in building out efficiency and management of their bottom line growth and expenditures.

- A part of the executive leadership team charged with Select Business Solution Reboot & Implementation
- Developed pricing matrix and service offering packages via Buyer Utility Mapping and Strategy Canvases for HR & Payroll Outsourcing unit

1st Source Bank

South Bend, IN

Wealth Manager – Wealth Advisory Services

Jul 2014 – Feb 2018

Collaborate with business partners and centers of influence to implement various estate planning techniques and wealth management strategies in service of High Net Worth clients.

- Established first inter-department collaborative efforts regarding client servicing and prospecting
- Took part in executive management team for bank-wide software implementation
- Led Social Security Advisor initiative and represented firm at St. Joseph Emerging Leadership program (EMERGE)

JPMorgan Chase Bank, N.A.

Chicago, IL

Relationship Manager – Private Bank

Nov 2009—June 2014

Hired as part of a team to spearhead the acquisition, servicing and growth of High Net Worth relationships within the bank including investments, private equity, credit, lending, and private banking.

- Led team to top 5% of sales/acquisitions through implementation of innovative servicing model
- *3-Time Sales Training Award Winner*
- Streamlined fraud procedures within servicing matrix

Edward Jones Investments

Mt. Prospect, IL

Financial Advisor

Oct 2008—Nov 2009

Develop community presence through effective service-driven integration and branding. Build a business and prospect pipeline through the investment and management of financial assets.

- Highest regional portfolio growth amongst peers for 3-month rolling average
- Nominated to co-manage legacy program office staff and assets under management (\$20MM+)
- Implemented financial literacy program partnerships within Greater Chicago (Northern Suburbs)

Robert W. Hyde

Education

The University of Notre Dame - Mendoza College of Business **Notre Dame, IN**
Master of Business Administration **May 2017**

Strategy - Consulting

- Fortune 500 Data Storage company project to revamp Customer Support & Service model
- Biotechnology firm to increase market share and value drivers for company
- City of South Bend Police Department: Promotion of positive community Relations and increase of internal morale.

Finance & Investments

- Training The Street – Financial Modeling
- Training The Street – Corporate Valuation

The University of Notre Dame **Notre Dame, IN**
Bachelor of Arts in Sociology - Scholarship Nominee for Academic Excellence **May 2007**

Awards/Achievements

Michiana Forty Under 40 **May 2016**
St. Joseph Chamber of Commerce

Distinguished Service & Financial Education Award **April 2017**
South Bend Human Rights Commission

Rising Star Award - Indiana **Feb 2020**
JPMorgan Chase Black Organization of Leadership Development (BOLD)

Professional Certifications

Certified Financial Planner (CFP) Candidate July 2022 **Nov 2020**
CFP Board

Life & Health / Property & Casualty Insurance Licenses **May 2018**
National Insurance Producer Registry (NIPR)

National Social Security Advisor (NSSA) **Oct 2016**
Financial Industry Regulatory Authority (FINRA)

Certified Trust Financial Advisor (CTFA) **Aug 2015**
Institute of Certified Bankers

Series 7 & 66 Investment Licenses **Jan 2009**
Financial Industry Regulatory Authority (FINRA)

Robert W. Hyde

Community/Volunteer Experience

Assistant Coach – Varsity Football
George Washington High School

2014 – 2016

Board of Directors
Musical Arts Indiana

2014 – 2016

Board of Directors – St. Joseph County
Junior Achievement USA

Oct 2016 – June 2019

Advisory Board Member – South Bend, IN (Kroc Center)
The Salvation Army

Sept 2014 – June 2019

Board of Directors
YMCA of Michiana, Inc.

Jan. 2016 – July 2019

Band Member - Musician
Epic Church in Mishawaka

Sept 2017 – Dec. 2018

Member – Greater South Bend, IN
100 Black Men of America, Inc.

2014 – Present

Head Coach
National Flag Football League

2019 – Present

Board of Directors – Professional Development Chair
Black Organization For Leadership Development (BOLD) Indiana

2021 – Present