

Goal Setting Committees At Large Professional Services	Application No: No: 20220303144548_12490
ELIGIBILITY	
PROFILE	
Prefix	Ms.
Last Name	Lopez
First Name	Julianna
Middle Name	A
Suffix	
Preferred Name	Julianna
Title	VP, Branch Leader
Are you a City of San Antonio resident?	Yes
San Antonio Resident Length - Years	36
In which City Council District do you reside?	01
How many years have you lived in the City Council District where you reside?	10
Address Type?	Residence
Address	
City	San Antonio
State	TX
Zip	78201
Phone Type?	Cell
Phone number	
Phone 2 Type?	Business
Phone 2 number	
Address 2 Type?	Business
Address 2	1313 SE Military Dr Ste 110
City 2	San Antonio
State 2	TX
Zip 2	78214
eMail	
Employer	Truist Bank
Job Title	VP, Branch Leader
Occupation	banker
Board/Commission/Committee Name	Goal Setting Committees~At Large~Professional Services~01
DEMOGRAPHIC INFORMATION	
The City of San Antonio strives for boards and commissions to be representative of	

our diverse community Providing the following demographic information is voluntary, and will only be used for statistical and reporting purposes.	
Race/Ethnicity (Please select all that apply):	Hispanic/Latino/a
Gender	Female
Age:	45 to 54
Do you identify as a sexual minority (such as lesbian, gay, bisexual, queer, etc.)?	No
QUESTIONS	
If this board position requires residency within Bexar County, the City of San Antonio city limits or within a particular council district, do you meet those residency requirements?	Yes
Do you or any of your immediate family members or any businesses that you or they own currently have any direct or indirect financial interest in any contract(s) with the City, including subcontracts?	No
Will you or any of your immediate family members or any businesses that you or they own seek a contract(s) with the City in the foreseeable future?	No
Do you or any of your immediate family members or any businesses that you or they own have any financial interest, direct or indirect, in any sale to the City of any land, materials, supplies, or service?	No
Does your employer or an employer of your immediate family members have a contract with the City?	No
Do you or any of your family members currently serve or in the past year served as an administrative aide to a Councilmember?	No
Do you currently serve in any elected or appointed public government office?	No
Are you a member and/or officer and/or employee of any boards, commissions, corporations, non-profit entities, agencies, or other entities?	Yes
Give the title and dates of any position which you have held in such organization	South SA Chamber of Commerce Board member 2018 2021, Harvey Najim YMCA Board member 2019 2022
Do you receive any compensation for service on this entity(ies)?	No
Do you intend to seek election or appointment to any public office or board or commission in the foreseeable future?	No
Have you ever been hired for a position with the City of San Antonio?	No
Describe your Educational history.	Holmes High school diploma, and Bachelors degree Incarnate Word University
Describe your Professional History & Certification designations (Current and historical).	31 years in Banking, commercial lending, and private banking, visit SA Tourism ambassador
Describe your Volunteer Experience & Community Service	Previously served as CASA, sat on YMCA Board 4 years, South Chamber board for 4 years, American Legion Committee, and Swell Advisory Committee,

	Chair the Business Advisory Committee with the Chamber
Please provide a brief narrative outlining your reasons for seeking appointment to this board or commission	I recently termed off the South Chamber Board and have been looking for an organization to volunteer with. This open position was emailed to me. It sounded interesting.
APPLICATION SIGN-OFF	
As a board, commission, or committee member, you will be asked to adhere to: Code of Ordinances, City of San Antonio, Part II, Chapter 2, Article IX, Sec.2-534. All board and commission members must file a Financial Disclosure Report with the Office of the City Clerk upon appointment, and annually thereafter, throughout the member's term. Failure to file a Financial Disclosure Report within the time required by the City's Ethics Code will be considered an automatic removal.	
I understand that if any member of the public makes a request for information included in this Application for Appointment, most of the information must be disclosed under the Public Information Act. I understand that the City of San Antonio will attempt to maintain the confidentiality of highly private matters by seeking an Attorney General's opinion in accordance with the Public Information Act. I understand that it may not be legally possible to maintain the confidentiality of such information, and I hereby release the City of San Antonio, and its agents, employees and officers, from any and all liability whatsoever if the information must be released pursuant to the Public Information Act or any other law requiring its release.	Acknowledged
OATH: I have read and understand the guidelines set out in this application. The foregoing statements are true, accurate, and complete. I agree that any misrepresentation or omission of facts may result in my disqualification for appointment.	Acknowledged
Enter Your Name	Julianna Lopez
Date of submission.	3/3/2022
The Texas Public Information Act provides that each government official may choose whether to allow the public access to the information in the custody of the City that contains your home address, home telephone number, or reveals whether you have family members. Please note that this does not apply to business addresses, which are subject to public disclosure. If an open records request is filed requesting to view or obtain records that contain your personal information, the City will take steps to protect your personal information as authorized by the Texas Public Information Act, but only if you have elected to protect personal information.	
I want the public to have access to my Home Address.	No
I want the public to have access to my Home Telephone Number	Yes
I want the public to have access to my Social Security Number.	No
I want the public to have access to my Emergency Contact Information.	No
I want the public to have access to my Family Information.	No
Please attach any additional information, such as a current resume, using the Attachments panel at the bottom of this page.	

Julianna A. Lopez

EXPERIENCE

BB&T now Truist

March 2018 – Present

Market Leader/Vice-President

Responsible for overall balanced performance of branch with an emphasis on commercial lending, deposit acquisition and non-interest income generation. Proactively initiate, develop and manage long-term, profitable relationships with consumer and commercial clients. Provide supervision of branch staff with a focus on the branch's sales efforts and coaching. Oversees branch operations including audits.

Randolph-Brooks Federal Credit Union

May 2016 – March 2018

Business Loan Officer/Processing

Responsibilities include outbound sales for commercial loans. Loan Processing of Commercial Real Estate loans including Construction Loans, and SBA Loans. The input of the initial application into Credit Management to Quality Check after the loan has closed. Developed Loan application file, to include opening title with Title Company, pulling Flood, ordering appraisals and environmentals. Scheduled closing with members and obtaining Tax Certificate, Hazard Insurance, and Membership with the members.

J.A. Lopez Business Consulting, San Antonio, Texas

September 2014-March 2018

Self Employed

Consulting services to boost the growth of small businesses by focusing on areas of risk to the business and deliver solutions tailored to the business and the users of the financial statements. Review of plan documents and operating procedures for overall plan strategy and cost structure. Assessment and recommendations for benefit service providers, payroll, bookkeeping, credit card processing, and financial and retirement planning. Advisory services for entity selection and restructuring, financial projections and forecasts, business valuations, mergers, acquisitions and sales, including debt and finance.

Bank of America, San Antonio, Texas

February 2011-September 2014

Small Business Banker/Vice-President

Responsibilities were to serve small businesses in the Central San Antonio area with annual revenues from \$250k up to \$7 million and leverage the power of the bank to provide comprehensive financial solutions to the customer. Managed business development for the central city area including managing a loan portfolio, coaching and training multiple branches, and completing product and service presentations in a high growth environment. Responsible for profitability of the small business customer base by leading with credit and deposit relationships along with all products and services of the bank. Accountable for prospecting and acquiring new priority small businesses as well as retaining and deepening existing relationships.

**WAMU Bank / Chase Bank, El Cajon, California
Small Business Relationship Manager/Vice-President**

July 2007-Sept 2010

Responsible for handling the relationship of portfolio clients of 4 branches to include small business accounts and commercial loans with one million or more in revenue. Built the relationships and serviced all the needs of 200 plus business clients in portfolio, and grew portfolio by cross selling to existing customers and outside sales to prospects. To work directly with each branch manager to reach the overall business goals of the branch, and assist in developing and cross training branch staff business products and services.

**California Bank & Trust, La Mesa, California
Client Relationship Officer/Assistant Vice-President**

July 2004-July 2007

Acquired and serviced business/commercial loans and bank services in accordance with individual established business development goals. Achieve portfolio growth and cross-sales goals. Made presentations regarding bank products and services to prospective clients and company principles. Performed underwriting functions as needed. Managed and would oversee lending assistants and loan specialists in branch.

**First Republic Bank, La Jolla, California
Assistant Branch Manager**

June 2001-July 2004

Responsible for raising branch totals for private bank with outside business development by proactive sales, outbound calling, networking, and cold calls to high net businesses. Managed a portfolio of private bank clients. Supervised and monitored quality, proactive customer service, and efforts of the sales team. Opened and closed branch which included, but not limited to, preparing and balancing daily work, bank deposits, ATM, and cash vault. Participated in weekly Asset and Liability meetings, manager meetings, and conducted sales meetings.

EDUCATION

The University of the Incarnate Word, San Antonio, Texas 1992 - 1999

Completed course work requirements for a BA in Business, and planning to complete a Masters of Psychology of Organization and Development.

Palo Alto College, San Antonio, Texas 1989 - 1992

AFFILIATIONS

South/West San Antonio Chamber – Board Member -Government Affairs & Business Advisory

San Antonio Bike Share – Serving Advisory Committee

Harvey Najim YMCA – serving as Board member

The Women's Club of San Antonio- member

Greater San Antonio Chamber of Commerce - previously on Ambassador Committee

American GI Forum - previously on Housing Committee

References Available Upon Request