

Brandon Gilliam

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Professional Experience

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| 2011-Present | Vice President | Advance Trust & Life Escrow Services, LTA |
| 2008-2011 | Asst. Escrow Manager | Dunnam & Dunnam, LLP |
- Originally a division of a now ninety year old law firm, Advance Trust & Life Escrow Services, LTA (ATLES) was formed upon the granting of a trust company charter from the Texas Department of Banking in early 2011. ATLES serves as the primary escrow agent for a publicly traded company working in the secondary market for life insurance known as life settlements. This company puts together groups of investors to buy fractional interests in unwanted or no longer needed life insurance policies from seniors as an investment. ATLES holds all of the money for the purchase and maintenance of the policies, and has had as much as \$220,000,000 under its control at one time.
 - One of two founding employees of the division of the law firm, and now serve as one of two Vice Presidents in a three person management team for ATLES, supervising both staff members and outside contractors (including information technology, custodial, facility maintenance, security system and others)
 - Primary person responsible for closing purchases of policies (since 2008, approximately 14,000 clients have purchased more than 65,000 fractional interests in more than 550 policies, purchased for almost \$1,000,000,000 and with a total death benefit of more than \$1,770,000,000, and institutional clients have purchased whole policies with a total death benefit of more than \$180,000,000)
 - Supervision of all account changes, hundreds per month, such as resales to other investors, abandonments, mandatory distributions, and transfers between IRAs (traditional to Roth)
 - Processing all policy maturities, including filing death claims and paying out more than \$144,000,000 worth of death benefits to thousands of fractional owners.
 - Coordination of annual financial and information technology audits, as well as annual information technology and safety and soundness exams from the Texas Department of Banking (Safety and Soundness exams regularly require the production and organization of roughly 7,000 pages of documents)
 - Serve as the Information Security Officer, responsible for the safekeeping of confidential information, as well as maintaining legal files, vendor management records, responses to subpoenas, and corporate insurance policies (building, E&O, health)
 - Telephone, email, and in person customer service, with IRA custodians, the life settlement company, its licensee network (outside sales) and its clients, who are of substantial means and must self certify as highly qualified investors
 - All purchasing, from custodial supplies to major information technology expenditures
 - Preparation of Board of Directors and Participant meeting materials, including agendas, tracking reports for audits and exams, critical vendor summaries, risk assessments, and minutes
 - Creation and maintenance of all training materials, including several hundred pages of manuals for our custom software, as well as training new staff and annual staff training on the Bank Secrecy Act, Customer Identification Program, Information Technology best practices, etc.
 - Creation and maintenance of all policies and procedures, totaling several hundred pages, many of which must be regularly updated in response to suggestions from auditors or examiners, or because of changes in the way we do business
 - Coordination of major projects, such as initial setup of temporary office space, moving company to newly constructed building, installation of new servers and migration to them, installation of imaging system and conversion of paper files to electronic records
 - Day to day technical support, backed by an outside contractor for major projects or problems
 - Coordination of website development, design and production of marketing materials
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| 2003-2008 | Communications, Technology & Facilities Manager | First Presbyterian Church of Waco, Texas |
| 2001-2003 | Director of Communications & Technology | |
| 1999-2001 | Administrative Assistant | |
- Development of an improved, focused, and integrated communications strategy comprised of printed materials, emails, and the world wide web. This included design and publication of multi-page weekly worship bulletins, monthly newsletters, email newsletters, posters, postcards, stewardship materials, church school brochures, newspaper advertisements and all other communications materials for a successful, downtown congregation with approximately 700 members

- Writing feature articles for newsletters and bulletins
- Serving as a staff resource for several committees and attending monthly Session (local governing body) meetings
- Serving as volunteer and special projects coordinator
- Management of an almost 30,000 square foot facility (with sections built in 1911, 1950, and the early 90s) and grounds (1.8 acres, included landscaped lawn, two parking lots and two landscaped courtyards, all managed organically), including the coordination and supervision of custodial service, lawn maintenance contractor, security officers, plumbers, flooring installers, electricians, painters, pest control and other contractors
- Installation, administration and maintenance of a mixed Macintosh and Windows network, including providing software support and training for church staff and volunteers, and supervising the use of a multi-thousand dollar technology budget
- Design, publication, and maintenance of the church website, which contained hundreds of pages and includes information on church programming, local and national church history, and Presbyterian beliefs

1997-1998 Travel Counselor

Carroll Cruises & Tours of Waco, Texas

- Sales and marketing of cruises, escorted tours, and group sales for an established travel agency with over two million dollars of sales in a fast paced and rapidly changing industry
- Customer service, conflict resolution, vendor relations, and the coordination and support of an outside sales force
- Design and publication of newsletters and marketing materials
- Good verbal communication skills, especially on the telephone, were required

1992-1996

Flowers by Design of Waco, Texas

- Coordination and set up of weddings, parties and other events for an established floral company, including supervision of work crews and assisting in the design and production of complex floral displays
- Working in an environment which required effective time management skills, where I regularly operated under deadline pressure
- Customer service and conflict resolution in an often high stress, fast paced work environment
- Teamwork, coordination of shared responsibilities, and cooperation among staff were required for events to be successful

Education

Baylor University of Waco, Texas, Bachelor of Arts (Psychology), December, 1996
 Midway High School of Waco, Texas