

Creating the Right Relationships for Success

Banking Partnership

What Businesses look for in Bankers

1. HONESTY – no false promises or misleading to make a sale
2. RESOURCEFUL– provide useful education and direction
3. ADVOCATE – understand what you do and your intentions
4. APPRECIATIVE – provide customers special attention, events, birthdays, referrals, etc.
5. RELATIONSHIP DRIVEN – focused on overall partnership, thinks long term

What Bankers look for in Customers

1. HONESTY– is the financial information being disclosed accurate
2. UNDERSTANDING – the answer will not always be “yes”
3. REFERRALS – become your banker’s center of influence
4. LOYALTY – if your bank has been supportive in interesting times, stick with them
5. RELATIONSHIP DRIVEN – provide the bank a chance to support your financial needs long term

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