

William G. Kopka

Objective

To be a catalyst in developing relationships that drive toward equity for underserved communities and individuals. To accomplish this, I leverage my network to identify missions in common, then I listen, educate, influence and connect partners within my company, non-profits, government entities, and private business.

Experience

Community Accountability Officer, Associated Bank, WI 2018-Current

- Community Development lead for the bank in MSAs including Milwaukee/Waukesha, Appleton, Sheboygan, Racine, Oshkosh, Fond du Lac
- Philanthropy, bank engagement, connecting bank to the community

Director of Loan Processing, Associated Bank, WI 2016-2018

- Manage 80+ FTE supporting Processing, Regulatory Disclosure and Closing of mortgage loans

Board of Directors, Milwaukee Community Land Trust, WI 2019-current

Housing Work Group Committee for Near West Side Partners, WI 2019-current

Board of Directors, [Habitat for Humanity of WI](#) 2012-2018

- Provide technical advice around mortgage lending, affordable housing fund development, and compliance training for affiliates
- Lead initial ideation and coordination between Habitat WI and ASB leaders to develop a compliant mortgage origination package
- Co-drafted a grant application to ASB seeking supportive funding to fund a liaison between Habitat and ASB supporting the loan program

Various positions described below, Wells Fargo and Company, OR, IL, MN, WI 1999-2016

- Community Development Lending Manager 2, AVP Wells Fargo Home Mortgage (7 years)
- Managed all facets of underwriting, training, marketing and advocating niche LMI mortgage programs including WFHM's Community Development Mortgage Program, USDA's Rural Development, Section 8, DPPs, Community Land Trusts and deed restrictions
- Recommended policies, trained sales teams, directly managed underwriters

Co-chair, Wells Fargo Community Funding Council (a Foundation program supporting the CRA Investment/Service test) (3 years)

- Directed community engagement in reputational management efforts
- Directed the annual funding cycle for 50 colleagues engaged in this civic philanthropy strategy aimed at supporting LMI and minority customers/geographies
- Reviewed and approved grant proposals (\$10K increments) leading to \$160K in grants annually
- Led the critical analysis, including development of the annual funding focus, non-profit roundtables, site visits, voting by the Council, and post-funding inspections
- Reviewed financials of non-profits to determine stability and funding diversity

Home Preservation Manager, Home Mortgage Servicing (2 years)

- Managed loan modification processing team

Consumer Credit Operations Manager, Consumer Credit Group (2 years)

Sales and Service Manager, Wells Fargo Bank (retail) (3 years)

Board of Directors, Community Capital Alliance (CCA)/[Minneapolis Foundation](#) 2010-2013

- Volunteered and led special events for this engaged philanthropic giving circle
- Led peers in a democratic process to establish a funding focus, publicize a Request for Proposal, vet applications, complete site visits, and ultimately select fund recipients

Loan Committee Member, [African Development Center](#) MN 2010-2012

- Reviewed and approved Small Business loan applications for both start up and expansions of minority owned businesses
- Educated loan counselors and borrowers in developing credit for future approvals
- Advocated successfully for ADC in a \$10k grant from CCA

Other employment 1995-1999

Territory Sales Manager – World Book Educational Products (W.Va.)

Corps Member/Project Director – AmeriCorps ([City Year Columbus](#))

Education

B.A., Urban Studies with an emphasis in economics, [The College of Wooster](#), OH 1999

Community Support

Various WF Diversity Councils, AmeriCorps alumnus and City Year Alumni Board, High School Hockey coach 2005-2006, United Way Community Support Campaign Site Lead 2007, 2009 and 2010. 2010 Graduate of [Leadership Twin Cities](#), a Chamber of Commerce program. 1997 internship at the [Urban League of Portland](#).

Qualifications

Extensive knowledge of mortgage products with expertise in CRA/LMI lending
Well-developed understanding of non-profits as referral partners and service providers
20 yrs supporting community relations and development
17 yrs management experience, including matrixed groups up with over 80 FTE
3 yrs Foundation experience through Wells Fargo's Community Funding Council (Chair)
7+ yrs as Lending/Program manager for Community Dev. Mortgage Program
20+ yrs customer service, including sales, leading and coaching to the optimal experience
9+ yrs working on affordable housing initiatives including originations, sales and servicing
5+ years active leadership of Diversity Initiatives
-Founded Wells Fargo's Lincoln Land Diversity Council (Springfield, IL)
-Lead Wells Fargo's Diverse Intern Program for mortgage ops, recruiting and hiring 3 FTE that continue to work for WFHM 3 years after interning
-3 years participating as a mentor in a Diverse Mentoring Program
-2+ years on a small business loan committee supporting minority business owners

Fully Proficient in Microsoft Office suite (Excel, Word, PowerPoint and Outlook)

About Me

I am a seasoned manager with a track record of developing high performing teams. I have a broad banking, sales and mortgage operations background, which I continue to leverage to advocate equal opportunity for our diverse customer base. I am passionate about partnering with non-profit agencies in order to facilitate homeownership financial education for low- and moderate-income borrowers. I am also experienced in negotiating strategic initiatives between different lines of business, and external community partners. Community Development drives me, and I have capitalized on every opportunity to represent my employer in the community, creating and celebrating accomplishments and innovations that help us stand out amongst banking peers.