AYMER M. CALLEJAS

SVP, PRIVATE CLIENT ADVISOR

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PROFESSIONAL PROFILE

Accomplished, results-oriented, bilingual professional highly regarded for managing ultra-high-net-worth client portfolios, generating revenue, and driving client satisfaction through a branded client experience. Dedicated leader with a proven history of building and motivating high-performing teams to exceed established goals and surpass all expectations. Increase client retention rates by rapidly identifying unique customer needs and establishing rapport. Organized and a keen eye for detail, with demonstrated ability to prioritize and manage multiple tasks simultaneously. Leverage strong communication skills to foster long-lasting relationships with colleagues, clients, and stakeholders. Thrive in fast-paced, collaborative, and diverse environments.

CORE COMPETENCIES

- Team Leadership and Management
- Client Relationship Management
- International Client Engagement
- Specialty Asset Management
- Trust and Estate Planning
- Investment Management
- Regulatory Compliance
- Wealth Management
- Client Acquisition
- Private Banking
- Client Advisory
- M&A Advisory

WORK EXPERIENCE

BANK OF AMERICA/MERRILL LYNCH, MELVILLE, NY, MAY 2016 TO PRESENT

SVP, PRIVATE CLIENT ADVISOR II - PRIVATE BANK, MAY 2023 TO PRESENT

- Chart successful course of directing sourcing and new client acquisition efforts focused on ultra-high-net-worth individuals (UHNWI) to grow portfolio assets and revenue.
- Administer a portfolio with over $1 billion in Assets Under Management (AUM) comprising 50 relationships generating over $5 million in annual revenue.
- Forge and cultivate key client relationships by leveraging personalized strategies to build trust as well as ensure long-term satisfaction and high retention rates.
- Build a robust internal and external network to facilitate seamless client onboarding and help achieve business development goals.
- Drive the Client Management Process (CMP) to deliver customized financial solutions and ensure alignment with unique client goals, needs, and requirements.
- Demonstrate expertise in assessing and identifying client needs and financial objectives to deliver tailored solutions, including investment management, trust, and credit products.
- Earn recognition as a trusted advisor responsible for leveraging a detailed understanding of the Bank’s products and services to effectively address complex client requirements; advise clients on their overall balance sheet, including asset allocation, wealth planning, and investment management.
- Align objectives and bridge communications with enterprise teams and divisions to provide clients with access to the full suite of Private Bank and Bank of America services.
- Deliver a consistent Branded Client Experience (BCE) to enhance client engagement and strengthen the Bank of America brand.
- Enforce compliance with internal risk and control policies as well as external guidelines, standards, and regulations.

KEY ACHIEVEMENTS

- Achieved a national ranking of 15th out of 522 Private Client Advisors in 2024.
- Earned a national ranking of 20 out of 500 Private Client Advisor in 2023.

SVP, PRIVATE CLIENT MANAGER II - PRIVATE BANK, JANUARY 2023 TO MAY 2023

- Guided a high-performing team of eight comprising a single client manager along with analysts, associates, trust officers, investors, and wealth strategists overseeing a $1B+ book of business in Assets Under Management (AUM).
- Demonstrated expertise in client acquisition, onboarding, and relationship building across the U.S., Latin America, Europe, and Asia, including valuable experience navigating cross-border financial regulations and client needs.
- Served as Market Liaison to Case Escalation Counsel tasked with streamlining onboarding for Non-Resident Alien (NRA) clients and ensuring regulatory compliance.
- Acted as a strategic partner to sales teams responsible for providing operational support to optimize the sales cycle and enhance efficiency.
- Expended the existing book by uncovering additional client needs, including credit, consolidation of outside assets, and next generation opportunities.

KEY ACHIEVEMENTS

- Played a key role in a $2B M&A transaction between AmBev and Cervecería Nacional Dominicana by ensuring seamless execution and alignment with client objectives.
- Supported the successful development and launch of the Private Wealth department in Long Island and the outer boroughs by developing robust infrastructure and service capabilities.
- Earned recognition as Market Digital Ambassador collaborating with the Chief Technology Officer and Long Island President to enhance the Private Wealth online platform and elevate the digital client experience.

VP, PRIVATE CLIENT MANAGER - PRIVATE BANK, OCTOBER 2020 TO DECEMBER 2022

- Delivered customized investment management, wealth transfer, and trust and estate planning solution guidance for ultra-high-net-worth clients with diverse portfolios.
- Specialized in alternative investment strategies, including REITs, hedge funds, private equity, venture capital, AI-driven investments, long/short positions, options, and derivatives.
- Partnered with the Specialty Asset Management (SAM) group to integrate timber, farmland, oil and gas interests, real estate, and private businesses into holistic client strategies.

KEY ACHIEVEMENTS

- Ranked in the top 10% nationally, achieving "Exceeds/Exceeds" ratings in every annual review since joining Bank of America in 2016.

AVP, FINANCIAL ADVISOR - MERRILL LYNCH, APRIL 2018 TO OCTOBER 2020

- Provided comprehensive financial solutions across deposit products, credit offerings, and investment strategies to meet diverse client needs.

KEY ACHIEVEMENTS

- Ranked No. 2 nationally among Financial Solutions Advisors (FSAs) in 2020, 60th in 2019, and 12th in 2018, demonstrating exceptional sales and advisory performance.

OFFICER, SENIOR RELATIONSHIP MANAGER, MAY 2016 TO APRIL 2018

- Managed a diverse portfolio of client relationships by identifying high-net-worth clients and referring them to specialized financial solutions.

KEY ACHIEVEMENTS

- Achieved top 100 ranking on the National Sales Ranking list among 8,000+ associates, consistently exceeding 200% of sales performance goals year-to-date.

PREVIOUS EXPERIENCE

CAPITAL ONE, SHIRLEY, NY, NOVEMBER 2010 TO NOVEMBER 2011 | **PERSONAL BANKER**

JPMORGAN CHASE, SHIRLEY, NY, JANUARY 2010 TO NOVEMBER 2010 | **BANK TELLER**

EDUCATION

MASTER OF BUSINESS ADMINISTRATION (M.B.A.) IN CORPORATE FINANCE, 2013

Dowling College, Oakdale, NY

BACHELOR OF SCIENCE (B.SC.) IN BUSINESS MANAGEMENT, 2011

Stony Brook University, Stony Brook, NY

CERTIFICATIONS AND TRAINING

- Series 7 & 66
- Notary Public of the State of New York

VOLUNTEERISM

- Jesus Christ Lives Ministry, Smithtown NY
- Suffolk County Auxiliary Police, Patchogue, NY

ADDITIONAL INFORMATION

Languages: English and Spanish (bilingual)

Technical Proficiencies: Microsoft Office Suite, Salesforce

Interests: Basketball (competitive), tennis (competitive), golf (recreational), soccer (competitive), and photography