



Jim Berner

Speaker Packet

*Motivational,
achievable, actionable.*



About Meridian's Jim Berner:



Jim Berner joined Meridian Associates in 2019 as a Valuation Specialist. Since joining the team, he has completed **over 200 business valuations** and assisted in numerous M&A transactions for multi-generational family-owned Petro companies. He currently **co-hosts Meridians live webinars with Meridian Associates Founder, Betsi Bixby**, on a variety of topics from marketing trends, to difficult people situation, to creating buzz in retail stores. Jim's passion for financial simplicity, identifying areas for business growth, and building high performing teams, makes him a perfect fit to serve multi-generational family businesses. Most recently, he was honored and humbled to be offered an opportunity to be a partner in Meridian Associates.

In 2010, Jim started his career as a customer service representative for a family-owned financial services company. His immediate success in customer service and debt collections were foundational skills in his next opportunity in restructuring defaulted residential mortgage debt, then assessing risk of complex loans. He has assessed the risk of over 7,000 loans with value of over \$1.75 billion. Never being taught how to lead a professional team, he received his first opportunity to lead in 2015. On a monthly basis, Jim was responsible for a pipeline of about \$175 million in loans. Through missteps and stumbling, **he discovered that superior teams are built on high trust through clear communication and knowing your people.** This is where Jim's phrase of **"however I can help, I will"** became his mantra. His most improved team to date were labeled by senior management as low performers and potential terminations. Reflecting on the development of his previously successful teams, he was able to assess their skills and **build effective individualized development programs that allowed them to advance in their careers.**

Jim was born and raised in the 'Steel City', Pittsburgh, Pennsylvania where his hardworking Christian German family was second to none in rolling up their sleeves and working hard. This is where he resonates with Meridan's first core value of **'God, Family, and Work'**. While finishing his undergraduate business degree from Robert Morris University (RMU), he unloaded trucks at night, landscaped, and sold merchandise at a local mall, while also being a member of the RMU Rugby Club, Go Domers! As a continued learner, in 2019, Jim completed his MBA from Baylor University, Sic'em Bears!

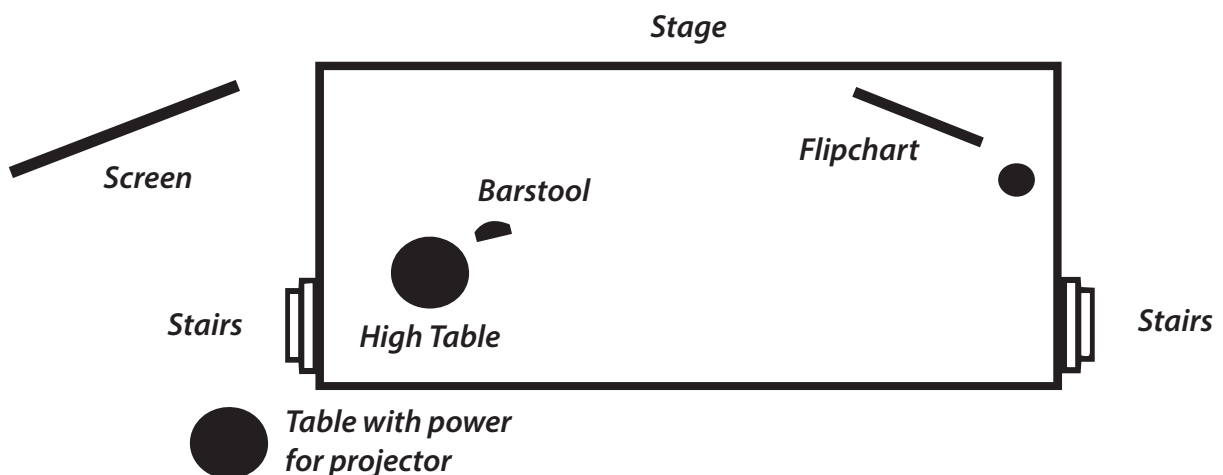
Jim now resides in Aledo, Texas with his incredibly talented wife, Nicole, and big personality son, Ford. Jim takes advantage of any opportunity he gets to be with his family. He loves being outdoors especially when it involves hiking, biking, skiing, and just about anything in mother nature.

Speaking Engagement Set-Up Preferences:



Speaking Set-Up Preferences

- Classroom seating preferred (if audience size permits, end wings slanted toward center)
- 2' X 6" table (for materials)
- Power strip (for computer)
- Small round table for projector with power and connections to monitor off stage
- Computer projector system
- Cordless lavalier microphone
- Screen
- Cocktail table and bar stool on stage (no podium)
- Flipchart with small round table and markers (for groups of less than 100)
- Riser (for groups of 100 or more)



PastTopics:

Bridging the Generation Gap

Reduce your headaches and save time learning how to bring older and younger generations cohesively together. Get the skills you need to coach your younger workers. Build an environment to maximize efficiency and improve culture for employees to effectively work together on their own.

Employee for Life: Passion, Purpose, and Impact

Employees for life are not imaginative like Sasquach or the Loch Ness Monster. Stop the guessing games and get the real reasons why employees love family businesses, how you can keep A+ employees from leaving, and what you can do to improve your family brand. We asked family business employees, future owners, and owners the tough questions, now hear the results.

Unify Your Team Despite Age Differences

Every team needs to work together as one unit, despite generational differences in older and younger workers. Learn how improve efficiency and company culture through coaching your younger and older workers to work together in unison.

Create a Happy Team for Happy Customers

Just about everyone knows that happy teams outperform teams who are not. Learn how you can build long-term happiness besides money.

