

ROBERT L. SMITH, JR.

319.290.4777 · RSmith@StrategicForesights.com



linkedin.com/in/robertsmith8

SKILLS

- Strategic Thinking
- Financial Structuring/
Creating Value
- Relationship & Trust Building
- Identifying &
Unlocking Potential
- Negotiating
- Creating Options & Solutions

LEADERSHIP ROLES

- **Bankingon** (Advisory Board
Member – Fintec)
- **Banno** (Past Chairman of the
Board – Fintech)
- **Bethany Bible Chapel** (Elder)
- **CCIM Iowa Chapter**
(Past State Chapter President)
- **Covenant Hospital**
(Past Board Member -
3,400 Employees)
- **Friendship Village**
(Board Member - Lifeplan
Retirement Community)
- **Gideons International**
(Life Member)
- **Greater Cedar Valley Alliance**
(Past Chair)
- **International Council of
Shopping Centers** (Member)
- **Iowa Securities
Investment Corp**
(Board Member)
- **McElroy Trust** (Trustee)
- **Society of Office &
Industrial Realtors** (Member)
- **YPO Real Estate Network**
(Past Chair)
- **YPO Iowa Chapter**
(Past Chapter Officer)
- **YPO Christian Fellowship
Network** (Past Board Member)
- **W.B. Small Trust** (Trustee)

Dynamic leader and relationship builder leveraging over 25 years of business expertise for entrepreneurs, business owners/boards, CEOs and management teams who want to grow, identify growth capital, build industry relationships, or prepare a company for an exit or transition.

EXPERIENCE

MAY 2018 – PRESENT

PRESIDENT - Strategic Foresights

Advisor, consultant, investor, independent board member who supports companies and family offices in their efforts to raise and invest venture capital, private equity or strategic partner capital, to prepare for IPOs, or to navigate other strategic or liquidity events. Bob serves on multiple boards and advises client throughout the United States.

SEPT. 1997 – MAY 2018

PRESIDENT - Lockard Companies

Managing corporate strategy and operations, sourcing capital, establishing strategic JVs and partnerships. Lockard grew from a local real estate owner into a nationwide Integrated Real Estate Solutions (IRES) firm. Involved in mixed use master planning, seniors housing, medical/healthcare, and large box retail with over \$2 billion in projects in 32 states. Invested \$350 million of capital from family offices, institutions, and high net worth individuals.

OCT. 2008 – FEB. 2014

CHAIRMAN OF THE BOARD - Banno

Founding Board Chairman of Banno, a Fintech company providing mobile banking products, web tools, web design/hosting, and a suite of innovative SAS products to over 375 banks and credit unions. Actively set company strategy, managed cash flow through growth, structured equity, debt and state incentives/funding. Sold the company to NASDAQ-listed Jack Henry & Associates.

JULY 2005 – OCT. 2013

CO-FOUNDER/EXECUTIVE BOARD MEMBER - Servant Investments & Servant Healthcare Investments, LLC (Bridge Seniors Housing Fund Manager)

National real estate investment platform based in Orlando, Florida. Raised capital from family offices, institutions, and high net worth individuals. In 2013 became part of Bridge Seniors Housing Fund.

NOV. 1992 – SEPT. 1997

VICE PRESIDENT COMMERCIAL LENDING - Homeland Bankshares

Established a \$50 million loan portfolio within 18 months lending to operating businesses and real estate owners. Spread financial statements, credit analysis and underwriting, and loan structuring.

EDUCATION

2004 – 2014

YOUNG PRESIDENTS ORGANIZATION - Harvard Business School Executive Graduate

Intensive in-the-classroom, case study-based learning experience with CEOs from around the world. Established deep relationships with other YPO members in diverse industries from around the world. Applied case studies and best practices.

SEPT. 1996 – MAY 1998

MASTERS IN BUSINESS ADMINISTRATION (FINANCE/REAL ESTATE EMPHASIS)

University of Northern Iowa

SEPT. 1988 – MAY 1992

BACHELOR OF SCIENCE, BUSINESS ADMINISTRATION (INTERCULTURAL STUDIES MINOR)

John Brown University