

JP Morgan 1995 Team Review

V1.0

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Reviewer Information:

Last Name: PALMER
First Name & MI: STEVEN K
Title: VICE PRESIDENT
Extension: (77) 6-4973
Location: 018/60W
CEN: 124393

Appraisee Information:

Last Name: YOUNG III
First Name & MI: SPENCER C
Title: VICE PRESIDENT
Extension: (77) 6-4805
Location: 018/60W
CEN: 121817

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Relationship to Appraisee:

Select the term that best describes your relationship to the appraisee.

I am the appraisee's: peer/colleague

Work Setting:

Describe the context of your work with the appraisee. Include the purpose and timeframe of the project(s)/assignment(s) and the appraisee's responsibilities.

Spencer is the chief operating officer of the conduit and is one of the principal architects of the conduit program at Morgan. I interact with Spencer on a daily basis regarding individual and pooled loan pricing, pipeline flow, closings, rate locks, originator relations and underwriting parameters. I have also interacted with Spencer during the marketing and education phases with each new originator, rating agencies relationships and investor meetings.

Extent of Interaction:

Extensive

Strengths:

Summarize the appraisee's strengths which made him/her effective on the project(s)/assignment(s). Provide examples which illustrate successful performance. (Click the Skill Sheet button for a list of skills to assist in evaluating the appraisee. Comment only on those skills which you observed.)

Client Focus- Spencer is extremely client focused and does an excellent job of responding to all our client's needs. He does a great job of keeping in touch with each of our external clients, managing their expectations and making them feel that their relationship with JPM is highly valued. Spencer is always positive and consistently looks for ways to resolve issues to improve our business. I have heard many positive comments from originators about Spencer and the service he provides to them.

Getting Things Done- Spencer has accomplished more tasks in the last year than a staff of several would accomplish at many companies in the same time frame. Spencer is highly organized, well planned out, efficient and results oriented. His planning and organization skills have paid large dividends through his creation of many of the key aspects of our conduit program including the pricing model, the Pipeline report and many aspects of our underwriting/pricing guidelines. Spencer has put in an enormous amount of effort and countless hours to insure the success of our program.

Working With Others- Spencer is a valued member of any team because he works well with others, is respected by those around him, does more than his fair share and gets the job done and on time. He leads by example through his always positive attitude, his respect for the opinions of others and his foresight on many issues. Spencer is a superior communicator and strives to keep those around him informed at all times.

Thinking/Judgement- Spencer is a very strong problem-solver who consistently tries to think ahead to resolve client issues and make our products better and more attractive in the marketplace.. He has excellent product/business knowledge and stays on the cutting edge of market developments

Ethics/Respect- Spencer is highly ethical, treats everyone in the firm with equal respect and has earned the respect of clients and colleagues alike. He is someone who strives for quality results in everything he does and has proven to be highly dedicated to CMFG and JPM.

Areas for Enhancement:

Identify areas in which the appraisee could be more effective. Provide examples and suggest ways the appraisee can improve performance. (Click the Skill Sheet button for a list of skills to assist in evaluating the appraisee. Comment only on those skills which you observed.)

-Continue to acquire more collateral/underwriting knowledge so as to increase effectiveness of interaction with the underwriters.

Feedback Discussion:

Have you discussed the contents of this team review with the appraisee?

We encourage you to have a discussion with the appraisee. Conveying your thoughts regarding strengths and areas for enhancement could help the appraisee improve his/her performance and your working relationship.

yes