

Julie Flanagan White '94 on the  
people-side of banking and on  
mentoring Regis students

# INDIVIDUAL VALUE

Spend a few minutes with Julie Flanagan White '94, assistant vice president of private banking at Needham Bank in Needham, Massachusetts, and you may find yourself wanting to open an account. It's not because she talks numbers; it's because her favorite part of the job goes beyond that.

"Hands down, it's the people," says White. "Relationships are the most important part of the business and I love meeting new people."

BY KRISTEN WALSH / PHOTOS BY KATHLEEN DOOHER



# IN

addition to servicing existing clients, White's primary responsibility is developing relationships with new clients, including small busi-

ness owners in the surrounding communities of the bank's operations center.

Her commitment to relationship-building has merit. A study by Deloitte and Efma (Wealth Management and Private Banking: Connecting with Clients and Reinventing the Value Proposition, 2015) found that in-person interactions—complemented by a multichannel approach to a relationship manager via mobile, online, and telephone “anytime, anywhere”—top the wish list for private banking customers. It's one reason you may find White taking a quick phone call during her son's basketball game on a Saturday afternoon or checking emails in the early evening.

“Even though Needham Bank has made tremendous investments in mobile and online banking, my job is to provide a concierge service to the client,” White explains. “There's a sense of urgency, and whether or not I have the answer, I own it. It's my responsibility to find an answer, not just pass the call to another department. That's not how we operate here.”

A commitment to serving people also spills over into the community. Needham Bank is a mutual cooperative bank with a credo of giving back to nearly 300 local organizations a year. White and a colleague, for example, brought their children to a bank-sponsored 5K to benefit local homeless people. This kind of service dates back to White's days at Regis, when she and Kim Oswiak Beland '94 would jump into a Volkswagen and head in to Boston to tutor students.

“I chose to attend Regis because it was a tight-knit community with a strong mission to empower others,” recalls White, whose mother held that same value of service. And once White got to campus, she became among the empowered.

“Sister M. Cabrini Angelli was instrumental in shaping my career; she helped me get my first job at Boston's Dana-Farber Cancer Institute coding cyto-genetic technology,” says White, who was a biology major. She later worked in medical sales and transitioned to financial services and business development in 2013 at Needham Bank. (White also credits other Sisters and Regis faculty members as mentors, adding, “There are too many to name.”)

### PERSONAL CONNECTIONS

Those Regis mentors are still top of mind for White. So when she was asked if Regis students could shadow her for a day at the bank as part of a job shadow pilot program for alumni, her answer was: “Absolutely.”



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JULIE FLANAGAN WHITE '94

Next on the agenda was an off-site networking meeting with members of the Business Networking Institute (BNI). Both Fuentes and Bebartá got their fair share of handshakes and conversations, and learned the art of the 60-second elevator pitch. (It wasn't a one-shot experience: Bebartá visited a BNI contact one week later for a company tour and to discuss potential internship opportunities.)

A meeting later in the day with one of White's clients made a big impact on Fuentes. “He shared the difficulty of figuring out what he wanted to do and how he was going to do it. Julie told us a similar story about her career path and I realized that it's not always an upward ladder; it's okay to not know what you want to do with your life in your 20s as long as you always put your best foot forward.”

It boosted Fuentes' confidence. “Julie embodies confidence and humility and demonstrates what it's like to be a successful woman in a male-dominated

Now it was Caroline Fuentes '19 and Nolan Bebartá '20 who were jumping into a car to head off campus on an empowering journey. The pair started the day at a board meeting with White and several other Needham Bank department heads.

“Both Nolan and I were able to contribute what we are studying and how it applies to the objectives that were being discussed in the meeting,” says Fuentes, who is a double major in management and psychology. In addition to going over a profit-and-loss statement and balance sheet, White and her team talked about the bank's 125-year history and its recent growth and change.

“I was impressed at how the bank has kept its core values of personal connections because often when companies grow they lose that,” says Bebartá, a management major. “I learned that no matter what I do, it's important to put the client, integrity, and respect first.”

During the meeting, White noticed the “intellectual connections” that Fuentes and Bebartá were making. “They may not have known specifics about the company, but they could easily relate in conceptual terms to what we were doing and why.”

Regis undergraduates Caroline Fuentes '19 and Nolan Bebartá '20 participated in the first alumni and student job shadow experience at Needham Bank.



### JOB SHADOW PROGRAM

Providing the opportunity for Regis students to shadow alumni on the job is a terrific way for students to get a sense of the working world. “Students learn what is expected in the workplace and it tends to decrease their anxiety about transitioning to the world of work,” says Susan Kennedy, director of the Regis Center for Internships and Career Placement. “It also gives alumni the opportunity to give back by sharing their knowledge and their networks, and to get to know the Regis of today.”

The “RegisConnect” job shadow program takes place during winter break. To learn more about hosting a job shadow, visit [alumni.regiscollege.edu/regisconnect](http://alumni.regiscollege.edu/regisconnect).

profession. I aspire to be in the same position one day in whatever career path I take.”

Both students learned about relationship-building. “I had not really seen firsthand the power of networking until the job shadowing program,” says Bebartá, who is considering a career in professional sales. “The more people you meet, the more opportunities and doors will open up.”

Speaking of opportunities, White considers the Regis shadowing program a two-way street. “Anything that gets you out of your everyday routine is a good thing. Caroline and Nolan posed questions that made me pause and give thought.”

And as for connections: “We hit the mark together, the three of us,” White adds. “I want to stay in touch so I can continue to be a resource and hear about all of the wonderful things I know they're going to do.” ■