

# Richard A. Yercheck

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## SUMMARY

Driven, strategic professional and community cultivator, committed to upholding the highest ideals of integrity and service in all aspects of life. 20-year career of relationship-building and technical expertise in the financial industry. 30 years of service and increasing responsibilities within National Ski Patrol, as well as numerous volunteer roles devoted to improving the lives of children, senior citizens, and individuals with disabilities.

**Personal Motto: Service above Self**

## PROFESSIONAL EXPERIENCE

### 2014 – Present, Manchester Avenue Securities, LLC, Monroe, NC

*President*

- Fiduciary at the highest legal duty of one party to another, it also involves being bound ethically to act in the other's best interests.
- Laser-focus on providing financial services solutions for often overlooked demographic – individuals with net worth of \$5M or under.
- Responsible for all aspects of daily business operations and management.
- Utilizes decades of strategic planning, investment, and financial analysis expertise to craft quality solutions for valued clients.
- Committed to providing exceptional client services within an integrity-based business model, holding client relationships in the highest regard.
- Develops comprehensive special needs family plans, designed to ensure resources are available to protect and care for vulnerable family members. Aligns business decisions with personal belief: *“People who are most at risk need someone to care for them the most.”*

### 2004 – 2014, TCA Financial Group, LLC, Charlotte, NC

*Founding Partner, Independent Broker Dealer,*

- Thoroughly reviewed and analyzed financial products via a variety of hands-on methods, including travelling the country to garner first-hand knowledge of products and teams.
- Synthesized product information and presented recommendations to management team.
- Seen as thorough, yet nimble, decision-maker amongst management team peers.
- Developed and maintained long-term relationships with individuals, families and businesses, creating dynamic, individually-tailored financial plans to meet changing and evolving life events.
- Represented firm as frequent economic talk radio guest on WDYT-AM and WBT-AM and fill-in host on WDYT-AM.
- Key player in successful 2014 merger with Prospera Financial Services and subsequent development of companion firm, Manchester Avenue Securities

### 1999-2004, Wachovia Securities, Charlotte, NC

*Financial Advisor*

- Analyzed client needs and presented appropriate financial solutions.
- Provided comprehensive investment and strategic planning solutions.
- Built ongoing productive and profitable relationships with clients and their families.
- Created & delivered presentation for rookie classes of financial advisors to expand their knowledge and skill set regarding business development, personal strategic planning and having an entrepreneurial mind set.
- Crafted industry-specific monthly articles published in Repertoire, a national magazine serving the healthcare distribution channel.

## **VOLUNTEER/CIVIC SERVICE**

### **Southern Division, Current Standing Committee Member, Strategic Planning**

#### **National Ski Patrol National Appointment #12250**

#### **National Ski Patrol Board of Directors, 2018-2020**

*Assistant National Chairman, Chair of Audit Committee, Chair of Fundraising Former Treasure  
Awarded Gold Merit Star*

#### **Paoli Peaks Ski Patrol 1991-1992**

Candidate to Basic patroller in one season.

#### **Beech Mountain Ski Patrol, 1992 – Present**

*Outdoor Emergency Care Instructor, Instructor Trainer, Southern Division Awards Judge*

#### **Blue Ridge Region OEC Administrator, 2010-2018**

- National Ski Patrol Mission: To help keep people safe on the mountain and during other outdoor activities.
- Provide leadership, guidance, and adherence of OEC standards to approximately 300 patrollers.
- Interpret National Ski Patrol vision, strategic objectives, and policies to patrollers.
- Manage quality assurance to ensure National Ski Patrol's OEC standards of training.
- Improved efficiency and responsiveness by building a "boots on the ground" team via an OEC lead at each mountain in region, who maintains close contact with OEC Admin.
- Awarded Purple Merit Star in 1997.
- OEC instructor since 1996
- Senior Patroller

#### **Union County Public Schools, 2012-2014**

*Elected County-wide Board of Education*

*Elected by the Board to be the Chairman*

- Established policies for operation of the 6<sup>th</sup> largest school system in NC.
- Provided oversight to superintendent and administrative staff who manages system's day-to-day operations, including \$389M budget, 5,000 employees, fleet of 300 vehicles, and 6M sq. ft physical plant.
- Drove the 1<sup>st</sup> system-wide student reassignment plan which addressed unmet needs of county ranked as one of fastest growing counties in entire United States.
- Gathered and responded to cross-section of community input via numerous town halls and committee meetings.
- Created foundation for ongoing strategic plan and realignment process to take place at designated metric points in future.
- Worked with County Commissioners to develop new funding strategy to ensure proper support for building maintenance and competitive salaries for locally paid employees.

#### **Heart for Monroe, 2018 – Present**

*Men in the Making Program Leader, Recruiter and Mentor*

- Organization Mission: To unite and mobilize churches, community organizations and individuals to address homelessness, hunger, education and relationships in our community.
- Recruit and Coordinate Men in the Making mentors at other local elementary and middle schools,
- Facilitate, Nationally recognized Men in the making mentoring sessions with students from local Title 1 elementary and middle schools.
- Utilize and adapt prescribed Men in the Making curriculum to fulfill program objectives and tailor to needs of group members.
- Serving as volunteer lead to ensure Men in the Making program continuity and consistency for The Heart for Monroe organization.

## **VOLUNTEER/CIVIC SERVICE**

### **The Arc of Union/Cabarrus, 2009 – July 2019**

*President, Former Treasurer, Vice President, & Board Member*

Organization Mission: To secure for all people with intellectual and developmental disabilities the opportunity to choose and realize their goals of where and how they learn, live, work, and play.

- Provides strategic leadership of non-profit board comprised of community leaders from 2 NC counties.
- Responsible for supervision and executive leadership coaching of executive director.
- Provides financial stewardship and guidance of \$365,000 yearly budget
- Served as Vice President during merger of The Arc of Union and The Arc of Cabarrus, successfully navigating not only the legal, financial, and operational aspects of the merger, but community concerns and building of new volunteer teams.

### **Union Symphony Orchestra, 2015 – Present**

*Current Chairman*

*Board Member, Gala Committee Member, Chair of Governance & Strategic Planning Committees,*

- Organization Mission: To entertain, educate, serve and inspire through music.
- Provide strategic leadership of non-profit board comprised of Union County community leaders.
- Responsible for supervision and executive leadership coaching of executive director.
- Provide financial stewardship and guidance of \$300,000 yearly budget.
- Ensure adherence to and fulfillment of strategic plan.
- Meet with donors and potential donors to secure ongoing donations to support and expand the organization.

### **Alzheimer's Association, Western Carolina Chapter, 2014 – Present**

*Speaker's Bureau Member*

- Organization Mission: To eliminate Alzheimer's disease through the advancement of research; to provide and enhance care and support for all affected; and to reduce the risk of dementia through the promotion of brain health.
- Conduct presentations and family/caregiver workshops on Legal & Financial Planning of Navigating a Dementia Diagnosis.
- Serves as a Legal & Financial Planning specialist on various panels and conferences in Western and Central NC.
- Fulfills approximately 8 speaking engagements per year.

### **Guiding Eyes for the Blind, 1994-1997**

*Dog Trainer, Assistant Area Coordinator*

- Organization Mission: To create and support life-changing connections between people and dogs.
- Raised and trained guide dog puppy, responsible for all aspects of behaviors, commands, tasks, and socialization.
- Conducted basic obedience and "Puppy Kindergarten" classes for NC trainer families.
- Conducted quarterly puppy evaluation meetings and provided trainer families with resources, guidance, and education to ensure successful puppy outcomes.
- Applied organizational criteria and relationship-building skills to conduct new home visits for potential trainer families; completed evaluations and made recommendations to organization leadership.

## **EDUCATION**

Masters of Business Administration - Montreat College, Montreat, NC  
Focused on Behavioral Economics

Bachelor of Arts, Business and Economics - St. Andrews University, Laurinburg, NC

## **Position Statement – For Position of Southern Division Director**

I'm Richard Yercheck and I'm running for Division Director. I want to share some ideas so everyone will understand where my focus will be as division director.

The division director position is multifaceted but breaks down in two ways. First is the responsibility for Southern Division to support our patrols and members at the local level. Second is the representation of the Southern Division nationally at the board of director level.

At the local level within the division, we are fortunate to have a team of very capable leaders to assist in the management of the division.

So where would I fit in as the division director? First, I am plain spoken and I do not micro manage. I let good people do their jobs, I do my best to support them, and clear the path of obstacles so they can succeed. The first job of anyone in leadership is to develop and advance those on the team. That said, I want to develop a leadership identification and development program. Patrol Directors and Patrol Representatives would identify and recruit the next generation of Southern Division leaders. We will develop a Southern Division Leadership workshop that will take place every year at our fall officers meeting. Our responsibility as leaders is to find our replacements, develop them and eventually move aside so they can advance. I believe every organization should have a solid succession planning process for expected and unexpected transitions.

Division support, I would like the division to be a clearing house for best practices. Our Regional Directors should be collecting ideas and disseminating them throughout the division. Each of us should be networking with the Patrol Directors and Patrol Representatives to make connections so that we can share our wealth of knowledge to allow each of us to learn from each other.

Change agent, Kaizen is the philosophy of continuous, incremental improvement. We don't have to make great strides all the time as long as we are all improving. Let's find ways to improve the Southern Division together.

The National level responsibility

When I was on the NSP board of directors I represented 38,200 NSP members through the world. As the Southern Division Director, I will advocate solely for

our division's roughly 1,200 members. My tenure on the board allows me deeper insight and a minimal learning curve when I work with the other division directors and the board. Leveraging those relationships, I want to work to change our election process. I believe each division should elect their own representative to the board. For too many years, one or two very large divisions have influenced the election process to skew the board of directors in their favor. Small divisions, like the Southern Divisions, have a hard time having a seat at the table; it's time for our division to always have a voice and vote on the national board of directors. In this same vain, we have to fight the apathy that is pervasive in the NSP. We routinely elect our board of directors with less than 10% of our membership voting. I believe the best approach will be for divisions to work from the ground up to build a better esprits de core among our members. To encouraged to them to find ways to support and lead their respective patrols, regions and division beyond patroller 101.

These are only a few of my ideas, I would like to discuss your ideas so we can improve the Southern Division together. Please give me a call or send me an email.

Thank You

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