

BUSINESS PROFILE

Joe Catti's bank flourishes with personal service, community outreach

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As one of the original creators of FineMark National Bank & Trust in 2006, CEO and President Joseph R. Catti has successfully catered to Lee County's financially elite. This year, its new 20,000-square-foot corporate headquarters opened, exemplifying success and the loftier side of Mr. Catti's vision. The bank focuses on wealth management for families and businesses, and wowing them with personal service.

In a kitchen adjoining the marbled lobby, reminiscent of a modern cathedral, a Culinary Institute-trained chef is on hand daily. He prepares gourmet lunches for meetings with clients in private dining rooms.

The new bank also has numerous small enclaves designed for discussing personal matters with clients, a large, state-of-the-art boardroom and a banquet hall that seats 140. Locker rooms and showers allow guests or employees to make a speedy transition to evening parties with local charity groups, often held upstairs. Mr. Catti said the building was designed by architect Bruce Gora and inspired by Frank Lloyd Wright.

But Mr. Catti's bank serves more humble purposes as well. A wide range of financial services are offered to people in any income bracket. And the new headquarters is demure in its location, tucked off College Parkway in Riverwalk at Whiskey Creek, instead of announcing itself on a busy thoroughfare.

The impressive space is also a regular meeting spot for groups Mr. Catti supports or donates to, such as Hope Clubhouse, Hope Hospice or The Salvation Army. This

Thanksgiving, Mr. Catti hosted a dinner for 100 needy people, who were fed with the help of The Soup Kitchen and United Way.

"Both personally and for the bank it's important to give back financial resources and time," Mr. Catti said. "I truly believe it's the right thing to do. It's really a founding principle of the bank."

That's why FineMark's 26 employees volunteer at a charity of their choice for a half day every month — with pay. It's also why Mr. Catti spends most of his free evenings at various charity events or meetings with some of the 11 boards he's involved with. He's also chairman of the Florida Gulf Coast University Foundation.

Mr. Catti, 51, has been a patron of the community since he moved to Fort Myers in 1992. In 2005, one year before FineMark opened, he was honored as Lee County Philanthropist of the Year. Next year, he'll chair the United Way fundraising campaign.

Mr. Catti grew up in Miami, where he got his start in financial services. He always had a knack for numbers, so he majored in finance and business at Florida International University.

"It seemed like the right thing to do," he said.

Richard Riley, FineMark's executive vice president, said "he's like a walking calculator."

But Mr. Catti also has widespread interests — especially health care. He is the immediate past chairman and current executive and finance committee member of the Lee Memorial Health System Foundation. In fact, Mr. Catti's first job, before becoming a banker, was director of development for the



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Joseph Catti

American Cancer Society in Fort Lauderdale, where he spent a year.

Mr. Catti works hard on his own health as well. Although he often doesn't get home until late in the evening, he fits a workout in most mornings around 5 a.m., doing sit-ups and running at a gym before going to the office. He also takes a run in Fort Myers every Saturday morning with a group of friends, typically going three to five miles. And if listening to music can be considered a part of healthy living or at least therapeutic, he's an AC/DC fan.

Most of all, Mr. Catti enjoys spending time with his family, a wife and four children.

Meanwhile, he is aiming to build lasting relationships with FineMark's primary clients: families or businesses for whom the

bank manages wealth.

"Ultimately, our goal is to allow each family to let us take on the role of (Chief Financial Officer), and work with the family members to determine what they need," Mr. Catti said. "We want to make the relationship as deep as we can... whatever area our clients need assistance, we'll help them, assuming we have the relationships in the community to do that."

For example, FineMark might help negotiate the buying of a car or house for clients who use their wealth-management services; they might even bring supplies to their home in the event of a hurricane or a family crisis or help plan for their children's education.

"It's a very high level of service," Mr. Catti said. "Not everybody that is wealthy cares about having a deep relationship (with their banker)."

Lunch meetings with clients may be held in one of FineMark's private dining rooms. Chef Michael Gavala, the food and beverage director, was in the kitchen preparing a three-course lunch one day last week: jumbo lump crab and tomato bisque; seared salmon over mesclun with mandarin oranges, goat cheese and a balsamic vinegar reduction; and flan for dessert.

Such elegant perks have helped make FineMark a success, but Mr. Catti said it has been a team effort.

"We're very fortunate to have so many really high-quality people, form our board to our employees and clients," Mr. Catti said. "That's the reason we've been successful."

FineMark will have a second, 10,000-square-foot location complete at Coconut Point, scheduled to open next month. ■

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| <p>Office/ Warehouse For Lease Billy Creek Commerce Center I-75 Access</p> <ul style="list-style-type: none"> • (2) Units each 10,000± SF • Billy Creek Commerce Ctr • Off Lockett Road • Off I-75 Ext 139 • Truck Access • Two (2) OH Door • Zoned IL - Light Industrial <p>Lease: \$7.95 PSF Gross Contact: Tom Woodyard or Carrie Vincent WA1941</p> | <p>Warehouse/Office For Lease New Construction</p> <ul style="list-style-type: none"> • 7,200± SF • Immediate occupancy • Large Yard-Fenced & Paved • Air-Conditioned Showroom • 12-Heavy Industrial • Four OH Doors • On Edison Ave. <p>Lease: \$4.95 PSF NNN + \$2.00 PSF CAM Contact: Todd Holman WA1929</p> | <p>Office/Retail Space For Lease</p> <ul style="list-style-type: none"> • 1,500± SF • High Visibility • Great Signage on Summerlin Rd • Located in Sunset Plaza • IPD Zoning • Retail Shell Units • OH Doors • County Water <p>Lease \$10.00 PSF NNN + \$3.50 PSF CAM Contact: Steve Wood or Todd Holman WA2025</p> |
| <p>Office/Warehouse Space For Lease</p> <ul style="list-style-type: none"> • 3,025± SF • IL Zoning • Centrally located • Off Metro Pkwy • Approx. 500± AC Office Space • Retail Shell Units • One OH Door • North of Crystal Dr. <p>Lease \$7.00 PSF Gross Contact: Todd Holman WA2051</p> | <p>Medical/Office Space Off College Parkway</p> <ul style="list-style-type: none"> • 1,000± - 2,100± SF • Existing Medical Office with Private Offices, Room To Grow • Diagnostic Center on Premises • 4 Exam Rooms, Waiting Area • Available Now • Medical Impact Fees Paid <p>Lease: Starting at \$16.00 PSF NNN + \$6.29 PSF CAM (est.) Contact: Alex Wright, CCIM WA1642</p> | <p>Office/Warehouse For Sale Fully Leased Income</p> <ul style="list-style-type: none"> • 7,200± SF • Westgate Industrial Park • Easy Access to I-75 and SR 82 • Zoned IL - Light Industrial • Retail Shell Units • One OH Door • Water and Septic <p>Price: \$540,000 Contact: Todd Holman WA1869</p> |
| <p>3,966+/- SF Commercial Building On Lee Boulevard NEW LISTING</p> <ul style="list-style-type: none"> • 3,966+/- SF Bldg • 1.15+/- Acres • 50+/- Parking Spaces • Drive-Thru Access • Former Fast-Food Restaurant • Zoned C2 - Commercial • Allows: restaurant, office/medical • Ask About Equipment <p>Price: \$765,000 Contact: Tom Woodyard or Carrie Vincent WA2046</p> | <p>Warehouse/Office Units Billy Creek Commerce Center</p> <ul style="list-style-type: none"> • 2,000 or 6,000± SF Unit • Individually metered • IL - Light Industrial • Off I-75 Exit 139 • Truckwell/OH Door • City Water/Sewer • Three phase electric <p>Lease: \$5.00 PSF + \$2.60 PSF CAM Contact: Todd Holman WA636L</p> | <p>Income Opportunity - 8.2% Cap Rate World Plaza II Medical/Office Condo FOR SALE Priced to Sell</p> <ul style="list-style-type: none"> • 3,000± SF • Long Term Lease in place • Medical Impact Fees PAID • Full Medical Built-Out • 20 Parking Spaces • World Plaza - Bldg 70 <p>Price: \$625,000 Contact: Tom Woodyard or Carrie Vincent WA1953</p> |
| <p>Office/Warehouse For Sale in Punta Gorda Income Property</p> <ul style="list-style-type: none"> • Four (4) Bldgs. • 2.72 Acres • Fenced, Gated, Lighted • Ample Paved Parking • Four (4) miles East of I-75 • From 1,250± SF- 5,000± SF • Zoned - Light Industrial • OH and Main Doors • Phase Three Electrical <p>Price: \$1,620,000 Contact: Honora' Jacobus WA1783S</p> | <p>Warehouse/Office For Sale</p> <ul style="list-style-type: none"> • 7,925± SF • 34,649± SF Land • 2 Units • 1 OH Doors per Unit • Fully Leased Income Property • IL - Light Industrial • Billy Creek Area <p>Price: \$83.00 PSF or \$657,775 Contact: Todd Holman WA2039</p> | |

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