



C.K. LEE

Questioner
DISC Type : c

President and CEO at InterBank
Colleyville, Texas, United States

Overview

C. K. Lee is the President and CEO of InterBank, a commercial bank with over \$4 billion in assets. His extensive background includes investment banking, serving as a federal bank regulator for the US Treasury, and working as a staff member on Capitol Hill. He holds a Masters from the London School of Economics.

An avid pilot, Mr. Lee holds multi-engine and instrument ratings for aircraft and serves on the board of the American Bonanza Society, an organization for Beechcraft enthusiasts. He also serves on the board of governors for the Dallas Symphony Orchestra, demonstrating a passion for both aviation and the arts.

Unique fact: Beyond his extensive career in finance and banking, he was raised on a family farm in Florida.

👉 Personality Overview

Systematic **Price-Sensitive** **Cautious & Analytical**

They prefer to analyze every situation thoroughly. They generally do not appreciate an overfriendly approach and prefer to stay to-the-point. While they don't hesitate to ask questions, they are generally risk-averse and tend to be late adopters.

👉 Topics They Care About

Aviation Safety
Serves on the board of the American Bonanza Society and other aviation safety organizations, reflecting a deep personal commitment to the pilot community.

Community Banking
Leads a regional bank focused on Texas and Oklahoma and has spoken on the keys to running a high-performing community institution.

Banking M&A

Has significant experience as an investment banker advising on bank mergers and acquisitions and was brought to InterBank in part for this expertise.

Financial Regulation

Previously served as a Regional Director for the Office of Thrift Supervision, where he regulated hundreds of savings banks and holding companies.

Banking Technology

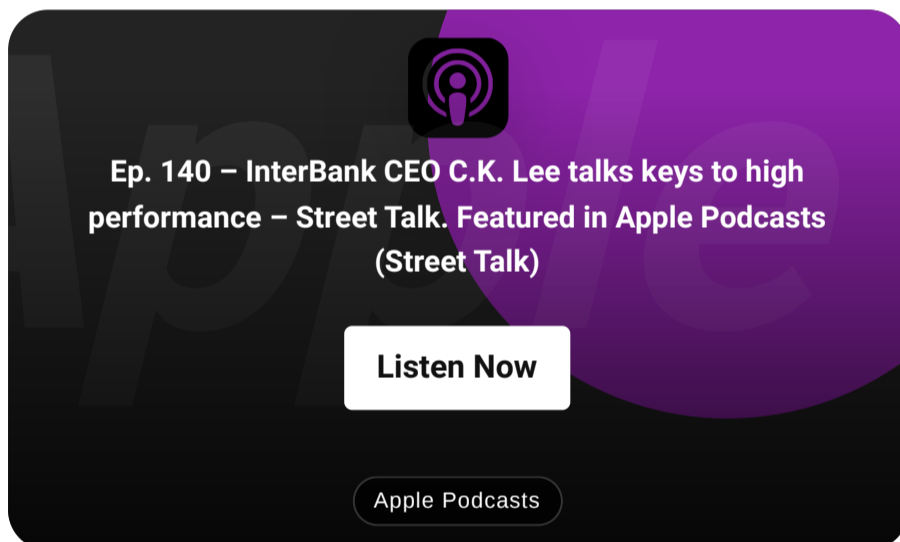
Focuses on strategic initiatives related to operational infrastructure and improving the customer experience, including utilizing technology like SD-WAN and Starlink for rural branches.

Florida Gators

[Predicted] Based on his Bachelor of Science degree from the University of Florida.



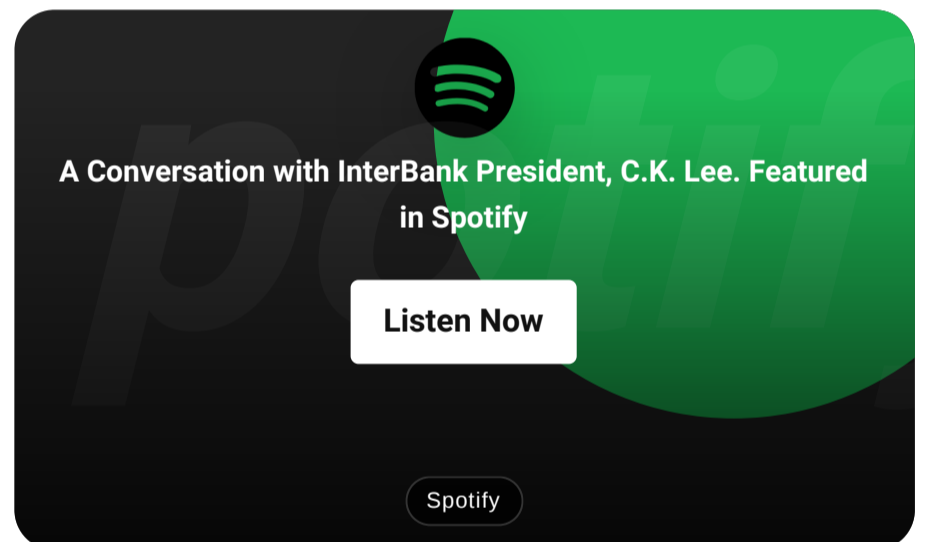
Media Appearances



Ep. 140 – InterBank CEO C.K. Lee talks keys to high performance – Street Talk. Featured in Apple Podcasts (Street Talk)

[Listen Now](#)

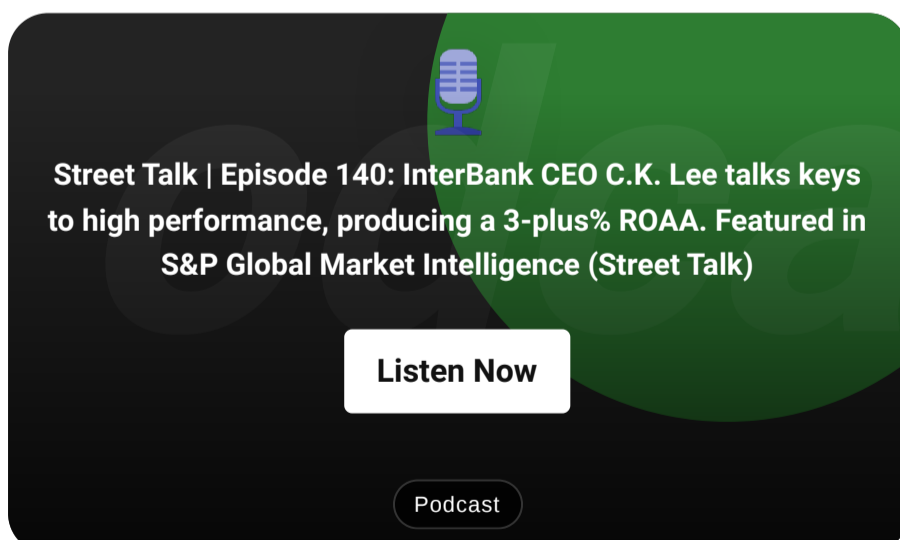
Apple Podcasts



A Conversation with InterBank President, C.K. Lee. Featured in Spotify

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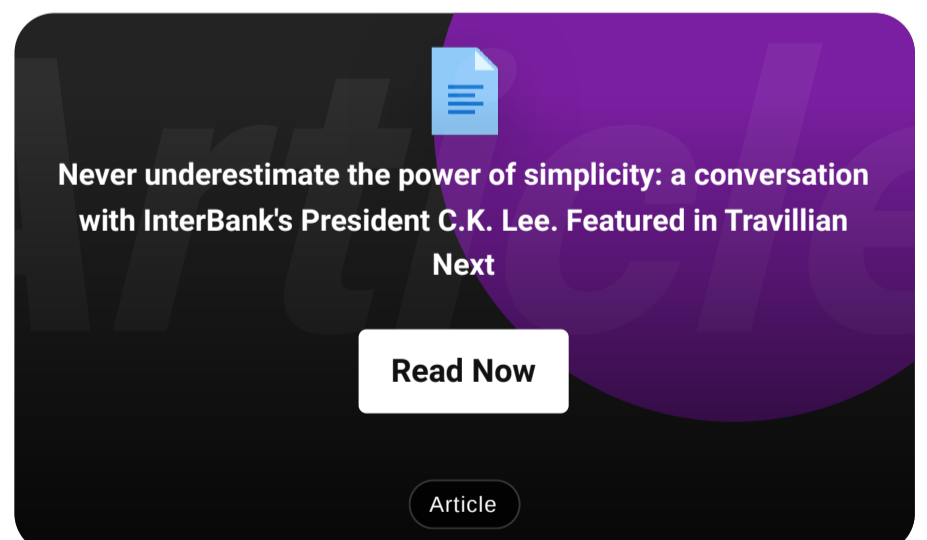
Spotify



Street Talk | Episode 140: InterBank CEO C.K. Lee talks keys to high performance, producing a 3-plus% ROAA. Featured in S&P Global Market Intelligence (Street Talk)

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Podcast



Never underestimate the power of simplicity: a conversation with InterBank's President C.K. Lee. Featured in Travillion Next

[Read Now](#)

Article

Work History

- 1-2024
President and CEO at InterBank
- 7-2020 - 1-2024
President and Chief Operating Officer at InterBank
- 11-2016 - 7-2020

Education

- 1997 - 1998
Master of Science (MSc) from The London School of Economics and Political Science (LSE)
- 1988 - 1990
Bachelor of Science (B.S.) from University of Florida

Managing Director at Piper Sandler

• 6-2010 - 10-2016

Managing Director for Investment Banking at
Commerce Street Capital, LLC - Member
FINRA/SIPC

• 5-2008 - 5-2010

Regional Director/OTS at US Treasury

More Information

Social Presence :



Prographics :

Exp : **30** Location : **Colleyville, Texas, United States** Job Level : **Leadership** Designation : **President and CEO at InterBank**

Insights For Selling To C.K.

👉 During A Call Or A Meeting

DO's

- Emphasise more on facts and measurable benefits
- Share as much information as possible regarding your product
- Keep some extra margin in hand as they will likely negotiate the pricing

DONT's

- Avoid rushing them, be polite and patient
- Don't try to be too friendly or informal with them
- Don't overhype the product/pitch, keep it measured

👉 When Cold Calling

Insights

Pattern Interrupt: Speaking in a slightly hesitant manner, and seeking their permission at the start through a negation can get you a chance.

Pace: Speak slightly fast, especially if you tend to be calm and confident. Sound like a 'knows their domain' person.

Tone: Keep your tone slightly apprehensive, as if you are a little unsure about calling them.

Tactics To Win: Use of negations, giving full information

Mistakes To Avoid: Use of superlatives, overusing social proof

Making The Ask: Use negations, it is extra effective with them. It gives them a chance to say no, they like doing that.

Subconscious Driver: They believe they know a lot, so it needs to make sense as well as make them curious. They need to think that it is something worth investigation.

Script

Greeting: Hi C.K., this is [user_fname] at [user_companynamewordstwowords].

Opener: You probably don't want to be on this cold call, would it be a problem if I asked for 30 seconds of your time?

Introduction: My company has leveraged 30+ years of research to build an AI that can predict anyone's personality, behavior and decision-making style before you even spend a minute with them.

Ask: Companies like [abc], [xyz] have been able to move [KPI1] by X% and [KPI2] by Y%. Would it be too much to put 15 minutes on your calendar to share why this could be high ROI for you?

Close: Can I suggest [time1] on [date1]? Or would you prefer any other slots? And [prospect_email] would be the right email ID for you?

👉 When Writing An Email

Subject: Objective

Example: Getting personalization right, '40% increase' etc.

Salutation: Yes (Something usual)

Example: Use 'Hi' or only the first name

Greeting: No

Example: Skip lines like 'I hope you are doing well'

Emojis/GIFs:

Bullet Points: Recommended

Closing Line: Logically summarize/ask

Example: Something like 'If these points make sense, shall we speak tomorrow?'

Complimentary Close: None or formal

Example: Something simple like 'Thanks', or nothing at all.

Tone of Words: Objective, informational

Overall Messaging: Focused on allaying doubts and ROI

Length of Mail: Short

Example: Ideally upto 100-120 words

👉 While Negotiating & Closing

The secret to closing fast with C.K. is

- *Confidence that the product provides ROI, effective pricing and process adherence matter the most to them.*

Will you ever get a clear answer from C.K.

- *It doesn't come naturally to them but they can say no if they are not convinced.*

Insights For Deal Planning

How Fast (Or Slow) Will C.K. Move?

- *They can move at a reasonable pace while making their decisions if they have the necessary information.*

Can C.K. Take Some Risk Or Not?

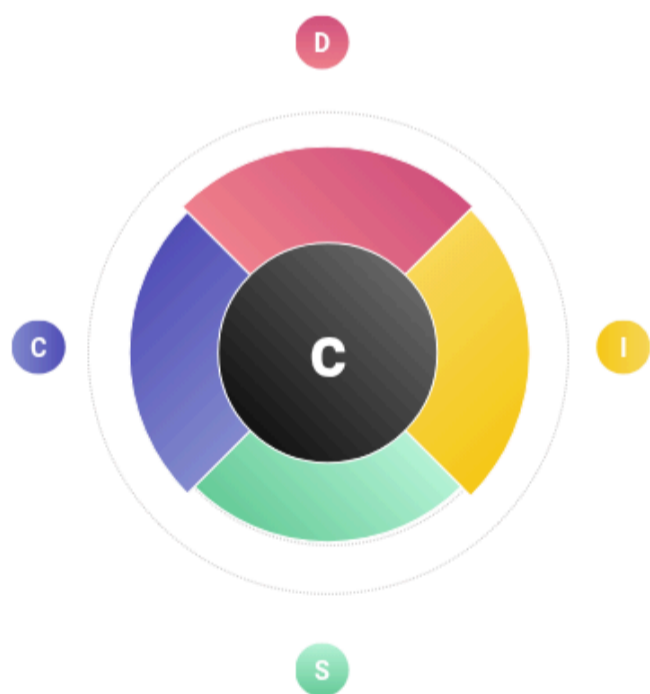
- *They can take risk if they are convinced that they have analyzed the circumstances well.*

You And C.K.

Personality Compatibility

Not enough data to show compatibility comparison

DISC Profile : C.K.'s Key Traits



CALCULATIVENESS

Calculativeness(C) reflects the degree to which a person is likely to be cautious, systematic and analytical. Those scoring high tend to emphasise quality and accuracy, enjoy showing off their expertise or challenging assumptions but can sometimes overanalyze things and be overcritical.