

2020



Year End Report

SMITH &
WILKINSON
PARTNERS IN TALENT

Executive Search

Leadership Coaching

Succession Planning

Compensation Consulting



From March 7th through the 10th last year, I was in Orlando, FL, with Cameron Boyd and thousands of community bankers at the Independent Community Bankers Association annual conference. We were collectively aware that there was a novel coronavirus causing pneumonia in China and Italy, but the threat was vague. We all joked with each other as we bumped elbows with raised eyebrows, crazy times, eh? Cam and I ate our last dinner of the trip in a terrific steak house, packed like sardines at the bar, another business trip in an unending rhythm of nearly 20 years out and about, conferences and sales pitches and client visits. I used to joke that the only people who thought business travel was glamorous were those who didn't have to do it. But I miss it.

The rest of the year proceeded from one crisis to another, and no one needs my help recounting them. Of course, we have an extraordinary amount to be grateful for, as does everyone who will ever read this report. Stable jobs, good salaries, and God willing our health and that of our families. I hope everyone will understand if I hold my gratitude in equilibrium with a sense of mourning for the world that we left behind last March.

Our executive search business, while down slightly in volume from 2019 (111 placements in contrast to 122 from the year prior), kept us exceptionally busy with dozens and dozens of challenging, interesting, and critical searches. Everyone, clients and candidates, pivoted beautifully to video interviewing, remote onboarding, and work-from-home. As a silver lining to these adaptations, we believe that using video interviews early in the process represents a marked improvement for speed, privacy, and efficiency.

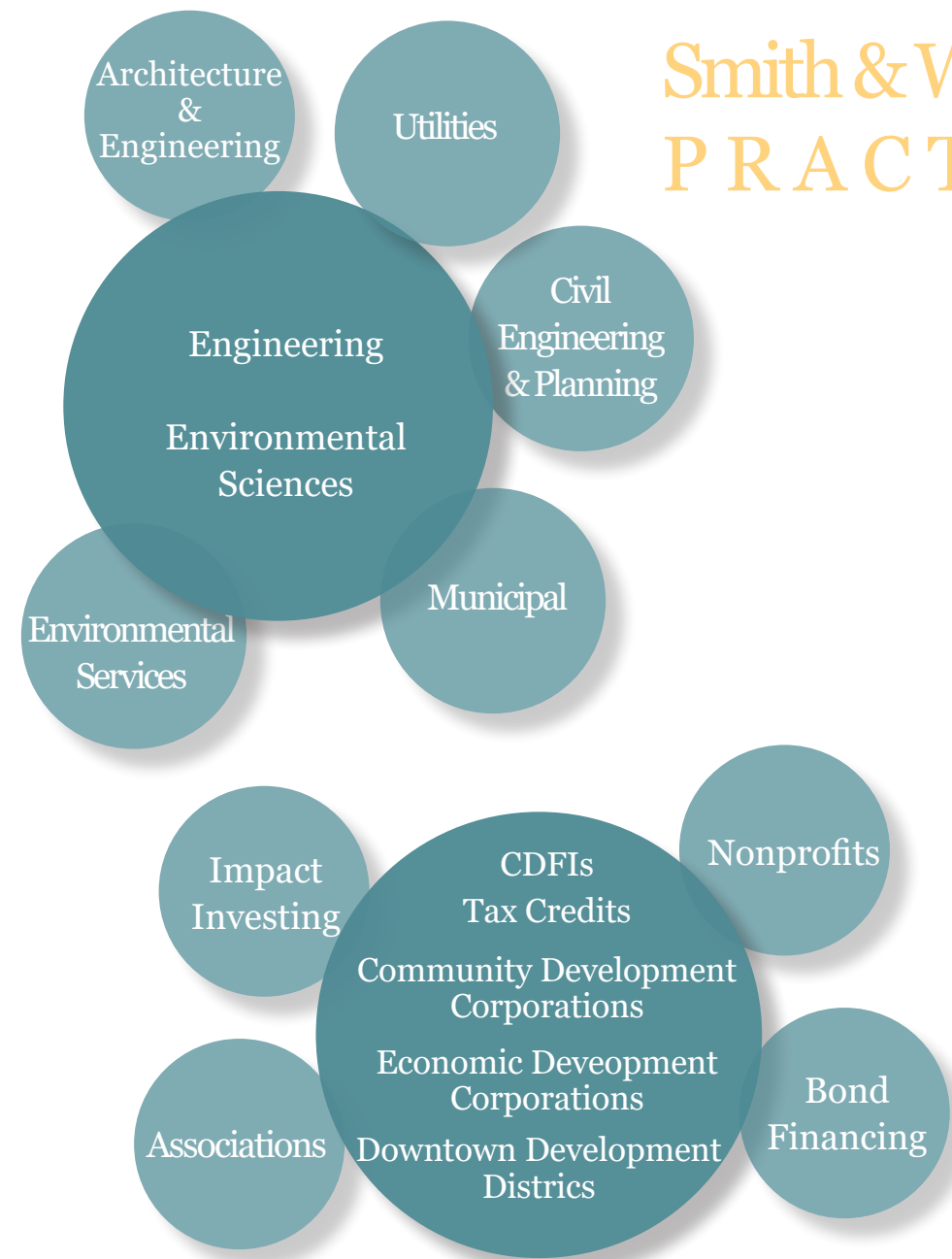
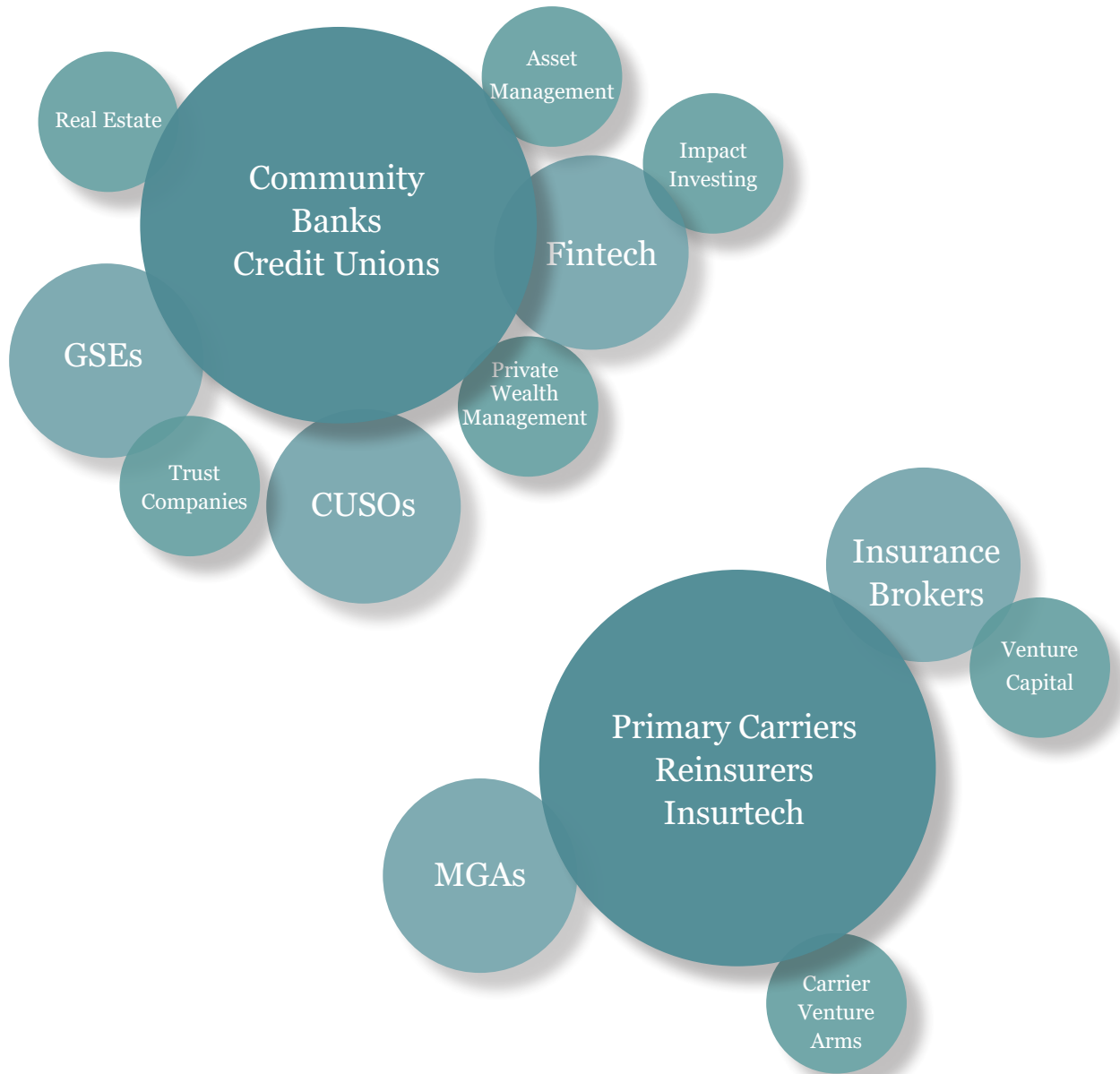
Our Leadership Development and Coaching program really took off in 2020, with over a dozen one-on-one and group coaching engagements. Leaders faced unprecedented challenges last year, to bring people together, create a sense of common purpose, and rise to the occasion in the face of fear, uncertainty, and hardship. We define leadership as "Taking responsibility for motivating others to achieve meaningful outcomes," and our proprietary curriculum is devoted to developing the social and emotional intelligence necessary to do just that. We're highly motivated ourselves to continue spreading this leadership gospel as far and wide as possible, and would love to tell you more about it.

We were able to set a new high-water mark for charitable giving in 2020, donating almost \$41,000 to a number of fantastic organizations, with a focus on food insecurity. I'm extremely proud of the entire S&W team for sharing this commitment to giving back. I choose to be an optimist, and I am bullish for 2021. In addition to our Executive Search and Leadership Development Coaching lines of business, we are also looking forward to a number of Succession Management engagements, and several Compensation Consulting projects. We anticipate adding at least a few more team members, and we're looking forward to spending time with them in person!

Thank you to everyone, clients, candidates, friends, and associates, for being part of the S&W family, and for making us part of your family. We are grateful for all of you.

-Carl Wilkinson, Managing Partner

Smith & Wilkinson PRACTICES



2020 PLACEMENTS

Financial Services

Position

President & CEO
AVP, Payroll & HRIS Manager
VP, Project Management
AVP, Business Continuity Specialist
AVP, Employee Relations Specialist
EVP, Chief Financial Officer
EVP, Chief Financial Officer
VP, Commercial Loan Officer
VP, Internal Audit
Commercial Portfolio Manager
Fraud Manager
EVP, Chief Risk Officer
VP, Asset Recovery & Collections Manager
VP, Director of Residential Lending
VP, Director of Financial Plannign & Analysis
VP, Director of Business Lending
EVP, Chief Experience Officer (CXO)
FVP, Chief Data & Analytics Officer
Residential Mortgage Loan Underwriter
Chief Compliance Officer
Loan Collections Servicer
Residential Workout Specialist
VP, Retail Operations
Commercial Banking Officer
SVP, Head of Wealth Strategy and Trust Services
VP, Branch Manager
SVP, Director of Operations
Information Security Officer
EVP, Chief Lending Officer
EVP, Chief Financial Officer
Digital Marketing Manager
VP, Commercial Loan Officer

State

MA
NY
NY
NY
NY
PA
NH
ME
ME
ME
NJ
NJ
NJ
NJ
NJ
NJ
MA
MA
CT
CT
MA
MA
MA
MA
NY
CT
ME
ME
CT
MA
NY
VT
NH

Institution

State Banking Association
\$16B Savings Bank
\$16B Savings Bank
\$16B Savings Bank
\$16B Savings Bank
\$900MM Bankers Bank
\$2B Savings Bank
\$1.1B Savings Bank
\$1.1B Savings Bank
\$1.1B Savings Bank
\$2B Savings Bank
\$2B Savings Bank
\$2B Savings Bank
\$2B Savings Bank
\$2B Savings Bank
\$2B Savings Bank
\$2B Savings Bank
\$2B Savings Bank
\$5.1B Savings Bank
\$5.1B Savings Bank
\$1.4B Savings Bank
\$410MM Commercial Bank
\$6.5B Savings Bank
\$6.5B Savings Bank
\$1.2B Savings Bank
\$2B Savings Bank
\$2B Savings Bank
\$980MM Savings Bank
\$1.2B Savings Bank
\$6.7B Savings Bank
\$1.4B Savings Bank
\$4B Commercial Bank
\$1.6B Credit Union
\$2.7B Mutual Bank

Position

SVP, Residential Mortgage Lending
VP, Deposit Operations
Chief Operating Officer
Chief Financial Officer
VP, Core Banking Manager
President and CEO
VP, Commercial Lending Manager
SVP, Chief Residential Lending Officer
EVP, Chief Risk Officer
SVP, Chief Lending Officer
SVP, Chief Information Officer
SVP, Senior Retail Banking Officer
Director, Mortgage Debt Management Solutions
VP, Branch Administration
Chief Financial Officer
VP, Deposit Services
VP, Commercial Lending Manager
VP, Risk Officer
VP, Commercial and SBA Lending Manager
Chief Financial Officer
President & CEO
BSA/Compliance Officer
SVP, Lending
VP, Branch Manager
VP, Commercial Lending & Administration
SVP, Chief Financial Officer
President & CEO

State

NH
MA
MA
MA
NH
VT
MA
MA
MA
CT
CT
MA
MA
NY
MA
MA
MA
MA
VA
MD
MA
MA
MA
MA
OH
VT
VT
MA

Institution

\$2.7B Mutual Bank
\$1.5B Savings Bank
\$430MM Commercial Bank
\$430MM Commercial Bank
\$1.1B Commercial Bank
Mortgage Bank
\$680MM Savings Bank
\$1.1B Savings Bank
\$1.1B Savings Bank
\$860MM Savings Bank
\$860MM Savings Bank
\$985MM Savings Bank
\$2.35B Credit Union
\$5.9B Credit Union
\$330MM Credit Union
\$330MM Credit Union
\$1.2B Credit Union
\$1.2B Credit Union
\$4B Credit Union
\$845MM Credit Union
\$650MM Credit Union
\$650MM Credit Union
\$650MM Credit Union
\$280MM Credit Union
\$690MM Credit Union
\$690MM Credit Union
FinTech

Insurance Industry

Position
 Financial Institutions Underwriter
 Director of Claims
 VP Strategy
 Senior Risk Associate, Pension Risk Transfer
 VP of Business Development
 IT Project Manager
 Data Governance Analyst
 IT Project Manager
 Quality Assurance Analyst
 Senior Agency Services Specialist
 VP, Account Executive
 Marketing Data Scientist
 Health Underwriter
 Project Manager
 Managing Director of Business Development
 Client Product Leader
 Senior Business Development Leader
 Deputy Pricing Director
 Director, EPMO in Operations
 Distribution Manager
 Financial Actuary
 Chief Investment Officer
 Claims Supervisor
 Director of Strategic Partnerships
 Life & Health Underwriter
 Property Treaty Underwriter
 Product Filing Associate
 Operations Director

State Institution
 MA Cyber MGA
 MA Regional WC Mutual
 FL Worksite Benefits
 CT Life & Retirement Carrier
 MA Cyber MGA
 MA MedMal Carrier
 MA MedMal Carrier
 MA MedMal Carrier
 IL InsurTech - Life & Health
 IL InsurTech - Life & Health
 IL InsurTech - Life & Health
 NY InsurTech - Life & Health
 NY InsurTech - Life & Health
 NY InsurTech - Life & Health
 DC InsurTech - MGA/ILS
 DC InsurTech - MGA/ILS
 DC InsurTech - MGA/ILS
 CT Life & Retirement Carrier
 CT Life & Retirement Carrier
 CT Life & Retirement Carrier
 CT Life & Retirement Carrier
 CT Life & Retirement Carrier
 ME Regional P&C Carrier
 NC IMO
 IN Global Reinsurer
 NY Global Reinsurer
 MA Regional P&C Mutual
 IL Property/CAT MGA

Environmental & Civil Engineering

Position
 Water Distribution - Project Engineer
 EH&S Project Manager
 Managing Principal
 Senior Industrial Hygienist
 Industrial Hygienist
 Principal
 Mechanical Engineer
 Civil Engineer
 Structural Project Engineer
 Water/Wastewater Project Engineer
 Water/Wastewater Project Manager
 Civil 3D Designer
 Billing Specialist
 VP, Office Manager
 Civil Engineer, Office Manager
 VP, Office Manager
 Chief Executive Officer

State Institution
 CT Water Utility
 WA Environmental Services Firm
 WA Environmental Services Firm
 WA Environmental Services Firm
 WA Environmental Services Firm
 WA Environmental Services Firm
 ME Architecture & Engineering Firm
 ME Architecture & Engineering Firm
 MA Engineering & Environmental Services Firm
 RI Engineering & Environmental Services Firm
 MA Engineering & Environmental Services Firm
 RI Engineering & Environmental Services Firm
 RI Engineering & Environmental Services Firm
 RI Engineering & Environmental Services Firm
 NJ Engineering & Environmental Services Firm
 NJ Engineering & Environmental Services Firm
 WA Environmental Services Firm

Community & Economic Development

Position
 Executive Director
 Chief Financial Officer
 President
 Director, Housing and Community Development
 Community Development Manager

State Institution
 VT Local Economic Development Organization
 MA Non-Bank Lender
 NH Regional Economic Development Organization
 NH State Economic Development Finance Agency
 NH State Community Economic Development Finance Agency

Across industries and organizations, studies show that the most successful leaders are intentional in their practices, and yet fewer than 10% of leaders have a plan to improve their strengths.

Smith & Wilkinson coaches work with new leaders, high potential employees, and seasoned members of the C-suite to build a new foundational understanding of effective leadership practices, a new perspective on interpersonal and organizational awareness, and new leadership methods and behaviors that will result in positive change and **demonstrably improved performance**. While leadership coaching is intended to upgrade unproductive behaviors and mindsets, it is not a remedial solution for problem employees.

Leadership coaching is a **strategic intervention** for executives who are ready to improve, one that builds on existing strengths and passions. The Smith & Wilkinson coaching curriculum is accredited through the **International Coaching Federation**, the governing body and gold-standard of professional coaching.

Coaching clients enjoy access to a library of proprietary materials, including curriculum workbooks, reflective exercises, cognitive exercises, action learning worksheets, and supporting materials including books, articles and video links.

Curriculum

- Introduction to the Behavioral Sciences
- Building Commitments
- Humble Inquiry
- Public Narrative
- Supportive and Strategic Networks
- Benign Neutrality
- Testing Assumptions
- Decisions in Times of Uncertainty
- Group Inquiry
- Effective Feedback
- Ongoing Regard
- Bold Vision
- Deconstructing Conversations
- Intentional Practices
- Coaching Moments
- Clear Expectations
- Covert Processes
- Thinking Partners



Sharon Dorsett is an organizational psychologist, experienced executive coach, and business consultant. In addition to her work in executive coaching and leadership development, Sharon also focuses on team-building, group facilitation, change management and organization development. Whether coaching a seasoned executive or a new leader, Sharon focuses on energizing and challenging individuals to discover barriers to success and increase leadership capabilities.



Charlotte Anderson is a certified coach and a member of the International Coaching Federation. She helps leaders transform personally and professionally, and in doing so, achieve peak performance in ways that embrace their unique purpose, style and skills. Charlotte spent over 30 years in the banking industry, most recently as Senior Vice President/Operations for Fulton Financial Corporation. After many years of coaching and mentoring, she realized that this was her passion and, she became a Certified Coach.



Wade Shows is Director, Learning and Organizational Effectiveness within Kaiser Permanente's National Sales & Account Management lines of business. Wade works with key business partners in Human Resources, Workforce Development and other Learning and Organizational Effectiveness leaders. Outside of Kaiser, Wade is an experienced executive coach who helps his clients identify road-blocks, see new perspectives, and build on their strengths to reach new levels of personal and professional growth. He works with both individuals and teams.



Beth Symes is a seasoned, certified executive coach and consultant focused on optimizing performance outcomes. Beth works with senior executives and management teams, utilizing a dynamic and demanding process of self-discovery, experiential learning, personal challenge, and goal setting to minimize behaviors that limit performance effectiveness. Clients consistently achieve their development goals and emerge from the coaching process ready to expand their role and responsibilities.

Smith & Wilkinson
Leadership Coaching

2020 Community Engagement

In 2020 Smith & Wilkinson was proud to donate nearly
\$41,000 to **14 local charities.**

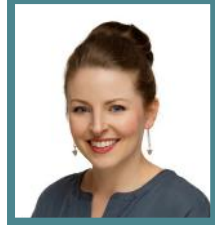
We hope to beat this amount in 2021 and continue
to give back to our community



OUR TEAM



CAMERON BOYD
Financial Services
Partner, Practice Director



JEN CAMPANARO
Community &
Economic Development
VP, Account Executive



BEN CHADWICK
Engineering
SVP, Director



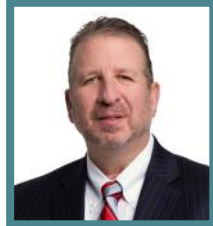
NICK HAYES
Credit Unions
Partner



CHRISTIAN HOMLISH
Insurance
Associate



KEN JORDAN
Insurance
Partner, Practice Director



CHRIS KELLEY
Financial Services
Senior Partner



EMILY NASON
Marketing &
Administration Manager



STEVE PEARY
Financial Services
Partner



QUIN PEEL
Chief Operating Officer
Partner



MIKE ROUILLARD
Financial Services
Associate



STACY ST. ONGE
Insurance
Partner



NATE TOWNSEND
Financial Services
Senior Associate



CARLL WILKINSON
Managing Partner



ZACH ZIMMERMAN
Financial Services
Associate

SMITH &
WILKINSON
PARTNERS IN TALENT

SMITH &
WILKINSON
PARTNERS IN TALENT