

SMITH & WILKINSON
PARTNERS IN TALENT

Celebrating
25
Years &
Counting



Carl Wilkinson



In June 1979, the United States hit an important milestone, when 18.7 percent of all US workers, nearly 20 million Americans, were employed in manufacturing, the highest percentage ever. Workers were trained and managed in specific, prescriptive ways; standards were set, tasks were assigned and measured. Individual workers reported to section leaders who reported to shop managers who reported to management in the corporate office in a hierarchy of command and control, a leadership structure designed to ensure consistency in the production of physical goods. Six Sigma was to be born a few years later. Consistency. Efficiency. Repeatability. This was the zeitgeist that informed professional leadership thinking for decades.

Fast forward to the present day. Over 80% of US workers are employed in one service sector or another, from healthcare and education to professional and business services to leisure and hospitality and beyond. Anyone reading this annual report is guaranteed to be a “knowledge worker” of one kind or another. We have a more diverse, more highly educated pool of workers laboring in industries where success is not defined by the production of products but instead by more amorphous ideals like customer experience and net promoter score.

We are moving rapidly away from traditions of hierarchy and sprinting headlong into the brave new world of distributed networks of decision making and autonomy. Managers providing instructions and accountability is fairly straightforward; leaders driving engagement and motivation among a highly educated, highly diverse, highly mobile workforce is a different thing entirely.

At the same time, we’ve got major demographic change on the horizon. In 2024, it is estimated that more than 11,000 Americans will turn 65 - every day - a total of over 12 million people over only the next three years. How many CEOs, CFOs, and other C suite executives reading this are wondering who is next in line to take their place when they retire?

The question for all of us in leadership roles is not how we stem the tide of change, but how we evolve and improve our own leadership skills, and how we equip our next generation of leaders with the skills and knowledge to be successful in this dynamic landscape.

We had the privilege of working on dozens of critical engagements in 2023, including a number of CEO Succession projects, CEO and various C suite searches, Group Leadership Development engagements, and Executive Coaching engagements across our footprint. We are more confident than ever combining Executive Search with Succession Planning, Group Leadership Development, and Executive Coaching to help our clients find, develop, retain, and promote their best and brightest.

Thank you for making Smith & Wilkinson a part of your talent strategy.

Sincerely,
Carl Wilkinson
President & CEO

About Us

- Founded in 1998, Smith & Wilkinson is a premier talent advisory firm with a national reach. We support our clients in achieving their strategic objectives through the recruitment, development, promotion, and retention of their top employees.
- We specialize in Executive Search, Executive Coaching, Small-Group Leadership Development, and Succession Planning. These services are delivered by specialty teams and industry experts, providing a comprehensive suite of solutions, innovations, and best practices that help our clients thrive.



What Do We Do?



Executive Search

Whether it's a new Board Member, a sales leader, a CEO, or a technology guru, our team understands the transformative power of the right talent at the right time. Our industry experts bring the insight, relationships, and credibility that come from having completed thousands of searches over the last two decades. Why Smith & Wilkinson? Because the best business plan is only as good as the team that drives it.



Executive Coaching

One-on-one executive coaching provides CEOs and subordinate executives with strategic support in the execution of their duties. All clients benefit from the best practices, confidentiality, and impartial perspective that an experienced executive coach can provide. One-on-one executive coaching is a journey of self-discovery and advanced leadership skill development that maximizes strengths and addresses limitations to drive superior performance.



Group Leadership Development

High-potential employees are seeking professional development opportunities, and small-group leadership development is a cost-effective way to build skills and shape a learning and development culture that yields tangible results. We offer a curriculum-based approach that supports the development of intermediate and advanced leadership skills, providing a level of depth and quality that most small and mid-sized organizations are unable to provide internally.



Succession Planning

Leadership turnover is inevitable, yet barely 50% of organizations have a formal succession plan for the CEO, much less other critical roles. We offer Succession Planning focused on talent mapping high-potential employees for key leadership positions, identifying the skills and experience required for success in each future role, and designing formal development plans. The right approach builds confidence for the C-suite and the Board of Directors, while also fostering a healthy learning and development culture. Key employees are exposed to growth opportunities, leadership techniques, philosophies, and stretch projects to build capacity.



Insurance Practice

At Smith & Wilkinson, we are committed to transforming the insurance industry, one game-changing hire at a time. No firm is better prepared to navigate the modern talent landscape, helping our clients lead, innovate, and adopt new delivery models and technology solutions that make protection products accessible to all. Our search assignments encompass nearly all seniority levels and functional areas of the insurance ecosystem, offering our clients and candidates maximum visibility into the talent market.

In 2023, the insurance team attended three conferences, two with Target Markets and one with MIAA.

Walker Robinson, Analyst | Stacy St.Onge, Managing Partner | Harrison Hines, Senior Associate | Colin Morgan, Senior Associate



278 Total Placements

37 Placements in 2023

17 Global Clients

38 MGA Clients

14 C-Level Placements

65 Underwriter Placements



Harrison Hines

Our philosophy is to act as a true extension of our clients, and we prepare as such. This is easier said than done, of course. We commit to reaching a high level of expertise on our clients' history, business model, and strategic goals, as well as their challenges, culture, and the requirements of any given role that we're recruiting for.

In a world where face-to-face interaction seems to be becoming less frequent, the value of meeting in person is second to none. Beyond discussing business, spending quality time with our clients and candidates is enjoyable, and nothing allows for a deeper connection than face-to-face interaction.



Walker Robinson

I've always loved the thought of problem-solving or tackling a challenge from multiple angles. I felt that a job in recruiting would allow me to do just that every single day, whether navigating a client's request or reading between the lines when searching for the right candidate. I knew that there was no singular way to go about finding a positive outcome for our clients' needs.

What I love most about this job is learning something new every day. You are constantly interacting with a vast range of people who have a wealth of knowledge. There is so much to learn about the insurance industry and plenty of nuanced information out there. There is no better way to learn than talking directly to industry professionals with years of experience.



Colin Morgan

I love getting to see and hear about different parts of the country through our client and candidate networks. There isn't a week that goes by where I don't learn something new about a different region of the country. It is such a treat to be able to serve our clients on a nationwide basis.

I enjoy working with Underwriters as they are a particularly curious and analytical group. Client-facing engagements are often an integral part of their role, so they need to be both analytical and interpersonally engaging. Just like in their day-to-day roles, they are pros at analyzing risk and managing relationships. When it comes to their job searches, it gives me a true sense of accomplishment when I can help them find their next role.



Felicia O'Reilly, Analyst | Steve Peary, Partner | William Wegener, Senior Associate | Darcy Flaherty, Senior Associate | Cameron Boyd, Managing Partner | Nate Townsend, Partner | Moriah Maron, Consultant | Chris Kelley, Senior Partner | Julia Crouter, Associate

Financial Services

For two decades, Smith & Wilkinson has set the bar for excellence in executive search for community FIs and related entities. Our clients have come to depend on our market expertise, commitment to excellence, professionalism, candor, integrity, and, of course, results. Our clients include community FIs (banks and credit unions), service providers, associations, nonbank lenders, financial technology (fintech) companies, community and economic development organizations, and government-sponsored enterprises.

Our tenured team of search professionals has experience representing clients across the spectrum of organizational missions, from those who view their roles as stewards of their customers' money across generations to companies looking to bring products to market quickly. Successfully completed engagements have included searches for Board Members, some of the most highly visible CEO searches in our space, and across functional areas including lending, credit, operations, technology, finance and accounting, risk management, human resources, wealth management, and marketing.

In 2023, S&W's Financial Services Practice successfully completed **84 executive searches**, including **8 President & CEO transitions**, and had **32** executives and high potential middle managers complete **executive coaching and leadership development** programs in partnership with S&W's Coaching Team.

In the past 10 years, our FS Practice has successfully completed **888 executive searches** across **24 states**, including **49 President & CEO transitions**.

Over the past 5 years, our Engineering Practice has:
 Successfully completed **80+ placements** with **19 clients**
 in **12 states**. **75%** of these were returning clients.
10 clients have **3 or more** placements,
 and we are a part of the **AEC** community, attending
9 industry conferences.



Ben Chadwick, Partner Engineering Practice

Engineering Practice

- The engineering, science, and design industry is complex, with many specialties. Each discipline and its application has unique challenges, opportunities, and needs. However, the collective mission is universal: to improve our communities and the world.
- At Smith & Wilkinson, we offer our clients and candidates maximum visibility into the talent market. We understand what's important in this industry. With a passion for this sector and the people we serve, we are a team of advocates dedicated to achieving the best outcomes for our clients and candidates.
- Our clients and candidates are at the forefront of building a better world, and we take pride in placing the right leaders (and providing the right resources) where they can make the most impact.



Executive Coaching & Group Leadership Development

Smith & Wilkinson is leveraging one-on-one executive coaching and group leadership development to accelerate the next generation of emerging leaders. Clients become more self-aware, more intentional in making conscious leadership choices, and more skilled in utilizing a variety of interpersonal strategies to create motivation and engagement on their team.

"Over the last year I certainly have become more empathetic while making members of my team realize that they are truly valued and that I am available to support them. I have taken the time to acknowledge their good efforts on a regular basis, I have intentionally made a point to recognize key milestones and they regularly ask how I can serve and support them."

*Data gathered from State of the Global Workplace 2022 Report, and DDI Leadership Forecast 2023

54% of organizations with effective leadership development report that they are in the top 10% of their industries.

Only **12%** of leaders rate themselves as effective in key leadership competencies.

Leaders who have effective coaching from management are **4.3X** more likely to feel they have a clear development path.

Meet Our Coaches



Wade Shows



Charlotte Anderson



Beth Symes



Sharon Dorsett

Client Spotlight

Sandy Ziegler | Senior Vice President, Director, Learning & Development, Penn Community Bank



TELL US ABOUT YOUR CAREER AS A LEARNING AND DEVELOPMENT PROFESSIONAL?

I originally went to school for social work and began working with a Welfare to Work Program in Philadelphia. During that time, I enjoyed teaching job readiness and soft skills. I was lucky enough to have a wonderful supervisor that encouraged me to take a facilitation course and I was hooked. I learned to develop content, deliver training programs, create needs assessments and I was on my way to becoming a learning and development professional.

HOW HAVE YOU SEEN THE WORLD OF L&D CHANGE OVER THE PAST TWENTY YEARS?

This industry has changed dramatically over the last two decades. I remember researching materials for content in college textbooks and magazines. Flip charts were a staple and at times I hand wrote my learning programs on legal pads. Word and PowerPoint were game changers, and the technology L&D professionals use now is incredible. Utilizing virtual platforms and eLearning has given the industry a boost of creativity and innovation. It has been an exciting time for L&D!

WHY IS PENN COMMUNITY BANK A SPECIAL PLACE TO WORK?

The people, the culture, a supportive Board of Directors, and our president and CEO Jeane Vidoni. Penn Community Bank believes in a lifelong learning culture. We love to develop our people and ourselves. As such, L&D has a seat at the table and recognizes employee development as a core and critical part of organizational success.

AS DIRECTOR OF LEARNING AND DEVELOPMENT, HOW DO YOU THINK ABOUT COMBINING TRAINING, COACHING, AND MENTORING TO GET THE BEST PERFORMANCE OUT OF THE BANK'S EMPLOYEES?

The three combined are very powerful. Delivering training programs - whether technical, soft skills, leadership, etc. - all have an importance. However, without follow-up and discussion it can fall flat. Coaching and mentoring provide the ability to reinvigorate and keep team members moving forward. I truly believe that coaching and mentoring creates opportunities for team member to turn a job into a fulfilling career.

WHAT IS THE LEADERSHIP CULTURE AT PENN COMMUNITY BANK, AND HOW DO YOU HOPE IT CONTINUES TO EVOLVE?

We couldn't ask for a better leadership team at the bank. Penn Community Bank leadership is made up of leaders who ask for feedback, coach, and mentor. We develop them to ask questions and gather information rather than micromanage. They advocate for their team and empower them to do great work and reach higher potential. They appreciate their people, provide opportunities, and share success.

WHAT HAS BEEN YOUR FAVORITE ASPECT OF LEARNING & DEVELOPMENT?

One of the things I enjoy the most in my role is career development with our team members. I enjoy walking through the process, creating goals and encouraging them to get them out of their comfort zone. I feel a great deal of pride when someone I have worked with receives a promotion or completes a successful project.

WHAT IS THE BEST PIECE OF LEADERSHIP ADVICE YOU'VE EVER RECEIVED?

Always give credit where credit is due. I follow this advice in my professional life and personal life. I have extended it to my children and my team members.

OUTSIDE OF WORK, WHAT ARE YOUR GREATEST INTERESTS AND PASSIONS?

When I'm not at work you can find me in the gym with my sister. She pushes me to try harder than the day before and it sets me up for a successful day. Being empty nesters, my husband and I like to catch a Phillies game and go to concerts with friends. But our favorite thing to do is spending time with our grown children and Dominic, our 7-year-old grandson. We have so much fun together.

Michele Estep | Chief Administrative Officer, OceanFirst Bank



YOU ARE THE CHIEF ADMINISTRATIVE OFFICER AT ONE OF THE MOST FORWARD-THINKING COMMUNITY BANKS IN THE NORTHEAST. LOOKING BACK, WHAT ARE THE SKILLS, OPPORTUNITIES, AND EXPERIENCES THAT HAVE HELPED YOU GET HERE?

Throughout my career, I have been fortunate enough to be surrounded by exceptional talent. It has enabled me to develop a growth mindset for not only myself, but my team. I believe in the power of those characteristics to succeed in business and in life. Seeking opportunities to deepen my experience, taking on assignments others shied away from, and challenging myself to learn new skills has served me well.

OCEANFIRST HAS BEEN ABLE TO ATTRACT A NUMBER OF EXCEPTIONAL EMPLOYEES. WHAT IS THE VALUE PROPOSITION FOR EXPERIENCED BANKERS TO JOIN OCEANFIRST?

The culture at OceanFirst Bank is built on our Core Values: Commitment, Performance, Leadership, Integrity, and Teamwork. They reflect how each employee is responsible for driving the culture through respectful interactions. Each team member's actions have influence and contribute to the success of the Bank. OceanFirst continues to invest in attracting, retaining, and developing the talented individuals through a range of initiatives including leadership development opportunities, employee recognition programs, access to state-of-the-art fitness centers, tuition reimbursement, and our WaveMakers community involvement program.

IN WHAT WAYS IS OCEANFIRST INNOVATING TO BETTER SERVE YOUR CLIENTS?

OceanFirst provides competitive products that focus on customized financial solutions for the banking needs of retail and business customers, including leveraging technology. We have a best-in-class technology team that is always working to make the digital experience better and more efficient for everyone. From online account

WHAT ARE YOU MOST PROUD OF WHEN IT COMES TO THE CULTURE OF OCEANFIRST?

The people. Team members live our Core Values every day and it shows in the success of the organization. It is important to OceanFirst to create a workplace that invites, embraces, and engages different perspectives in the changing workforce to enable our employees to achieve their best. OceanFirst is a preferred employer among financial services companies in our market by fostering an environment of respect, professionalism, and diversity that attracts, retains, and develops an initiative-taking and talented staff.

OUTSIDE OF WORK, WHAT ARE YOUR GREATEST INTERESTS AND PASSIONS?

As a WaveMaker at OceanFirst Bank, I volunteer my time within our communities. OceanFirst is committed to the communities in which we operate, demonstrated by the Bank's support of local nonprofit organizations that broaden access to the arts, food, shelter, healthcare, education, and an optimal environment for our neighbors. OceanFirst bankers and the OceanFirst Foundation assist hundreds of non-profit organizations in the markets we serve to make a difference in our communities. In my downtime, I like to spend time with my family, play tennis with my husband, and read. It all keeps me very busy, and I wouldn't have it any other way.

Client Spotlight

Lawrence Beals, President

BEALS • ASSOCIATES INC.



BEALS AND ASSOCIATES SEEMS TO HAVE WORKED ON SOME OF THE MORE AMBITIOUS LAND DEVELOPMENT PROJECTS IN THE NORTHEAST. HOW HAVE YOU BEEN ABLE TO SUCCESSFULLY COMPETE AGAINST MUCH LARGER FIRMS THAT “PUNCH ABOVE YOUR WEIGHT” SO TO SAY FOR SOME LARGE AND HIGH-PROFILE PROJECTS?

Over the years, we have observed that there are only a few truly exceptional professionals in our business and we have focused our efforts on finding the best, providing the tools and resources for them to excel, and working to keep them as long term employees. In our business, we have two crucial assets - our clients and our employees. With good employees, we can maintain good clients and good projects. The advantage of a small firm is that it can maintain exceptional staff from top to bottom with no dilution of talent. Having collaborated with larger firms on projects, we have observed that there are relatively few exceptional performers and a lot of average professionals. On any project, it is the individuals and not the firm that causes success.

AS SOMEONE WHO HAS FOUNDED TWO HIGHLY SUCCESSFUL FIRMS OVER YOUR CAREER WHAT HAS BEEN THE PHILOSOPHY BEHIND YOUR SUCCESS AS A BUSINESS LEADER IN NEW ENGLAND?

As discussed above, developing and maintaining the members of our firm is essential. With our clients, we work to develop close, fiduciary relationships. We are still working with clients that we began with in the mid-eighties because we trust them and they trust us. Our clients' goals become our goals and we work with an intensity necessary to achieve those goals. Our clients understand that we are in business to support them and we will perform the necessary advocacy to ensure success. Clients know that they may call anytime and in fact we encourage them to call as necessary. Frequently a late night call or a weekend call begins with an apology for the

YOU'VE BEEN BASED OUT OF BOSTON FOR OVER 40 YEARS. WHEN IT COMES TO REAL ESTATE AND CIVIL INFRASTRUCTURE, HOW HAVE YOU SEEN THE CITY CHANGE FOR THE BETTER?

In some respects, the City has changed for the better but it remains under a lot of stress from competing interests. The different interests tend to make new projects difficult. We have been working on the New Balance Boston Landing project from the date of its original conception in 2005. Many people worked very hard on the development and it is a great example of how a public/public private partnership can create a new neighborhood that benefits the residents and the businesses. The transformation of the Boston Landing area has been amazing.

THERE SEEMS TO BE A LOT OF DEMAND FOR ENGINEERING AND PLANNING TALENT, AND A LIMITED SUPPLY. WHAT IS THE VALUE PROPOSITION FOR ENGINEERS AND PLANNERS TO CONSIDER A CAREER AT BEALS ASSOCIATES?

The greatest opportunity that we can offer prospective employees is an opportunity to grow and develop as a professional. In a small firm, a new member quickly becomes an important component of the firm. We believe in mentoring staff and helping them to develop their technical knowledge along with project management and public presentation. As mentioned earlier, we advocate for our clients.

IN WHAT WAYS IS BEALS ASSOCIATES INNOVATING TO BETTER SERVE YOUR CLIENTS?

We work in a world of evolving regulations so it is critically important that we stay current and advise our clients as regulations and permit processes change. It seems that the change is always in the direction of being more complicated and more difficult. By staying current with regulations and best practices, we can help our clients navigate through the regulations.

WHAT SORTS OF PROJECTS ARE YOU MOST EXCITED ABOUT TO WORK ON IN 2024?

I am excited about all of our projects. Our corporate culture that is instilled with everyone in the firm is that there is no such thing as a small project. Projects are created by clients hoping to create value. We have found that almost every “small” project with a new client has the potential for future larger projects. In many cases, clients that began with us on small projects years ago are still working with us and the relationship usually grows to much larger projects.

Sabrina Fry, Vice President Human Resources, ISC



YOU COME FROM A MIXED BACKGROUND OF INDUSTRIES. WHAT ULTIMATELY DREW YOU TO THE PROGRAMS SIDE OF INSURANCE AND WHY IS THE MGA SPACE A GREAT CAREER PATH FOR UP-AND-COMING TALENT?

I came from primarily technology organizations, providing HR business partnership to engineering teams. It was an incredible journey. I decided to join ISC because the work is all about building, and we have the autonomy to move fast. Our executive team is very focused on hiring people from different areas because there is an opportunity to make a significant impact in this space. For me, the work I did in engineering is very relevant to ISC. We also prioritize creating a culture of ownership, which is very compelling to our owners.

WHAT PROBLEMS ARE MGAS AND MGUS GENERALLY, AND ISC SPECIFICALLY, UNIQUELY ABLE TO SOLVE FOR THEIR CUSTOMERS?

To lead in this space, you need to have to have a great deal of innovation and with that a culture of innovation. It is about customer relationships, and I see that here at ISC. A tech first and tech enabled organization will win the hearts and minds of our owners and clients every time.

IN WHAT WAYS IS ISC INNOVATING TO BETTER SERVE YOUR CLIENTS?

We actively engage with Lance AI and participate in their Hackathons, which are instrumental in fostering innovation. Our focus includes developing new feature sets to simplify and enhance the accuracy of rating and analysis. Additionally, we create new programs and establish partnerships with firms to drive innovative solutions.

OVER THE PAST FEW YEARS, WE'VE SEEN A LOT OF MOVEMENT OF TALENT FROM TRADITIONAL CARRIERS TO THE PROGRAM SPACE. WHAT IS THE VALUE PROPOSITION FOR EXPERIENCED INSURANCE PROFESSIONALS TO JOIN ISC?

ISC is a place where everyone plays a crucial role and feels valued, not just another cog in the wheel. We enjoy a balance of autonomy and structure, which is a sweet spot for productivity. And most importantly, there are no jerks here! It's wonderful to work in a place where everyone gets along so well.

WHAT ARE YOU MOST PROUD OF WHEN IT COMES TO THE CULTURE OF ISC?

Ownership, and the belief that keeping our people informed and giving them a voice in decision-making, are foundational to helping our owners thrive. We have 320 owners, and we also take deep personal responsibility for the families and communities we serve.



Community Spotlight

Center For Grieving Children



An organization we have consistently supported over the years is The Center for Grieving Children. The Center for Grieving Children is a nonprofit organization that provides a safe space, loving peer support, outreach, and education to grieving children, teens, young adults, families, and the community. With services in Portland, Sanford, and virtually, the Center offers these services at no cost, led by dedicated and highly trained staff and volunteers, thanks to the generous support of the community. The Center is the ONLY one of its kind in southern Maine, providing year-round peer support in a “family-style” model. Studies show that the better parents and caregivers cope, the more successful children are.

The Center offers three primary peer support programs:

- Bereavement groups provide grief support for children, teens, their parents and caregivers, young adults, bereaved parents, and widows/widowers/partners.
- Tender Living Care provides support for children, teens, young adults, parents, and caregivers through the changes that come with a family member’s diagnosis of serious illness.
- Intercultural groups create healing communities for children and teens resettled in Maine from countries that have experienced war, violent conflict, and natural disaster, offered in collaboration with Portland Public Schools.

Last year, with the help of more than 200 volunteers donating more than 19,130 hours of time, the Center served 647 participants in Peer Support Groups, 911 individuals via phone and email, and 1,733 individuals via our community education and outreach efforts delivered at schools, workplaces, nonprofit organizations, and other youth-serving organizations—wherever there are grieving children and families.



The following is a testimonial from an adult peer group participant:

“I am so grateful that we found the Center and all the amazing humans who have helped guide and support us through this awful loss in our lives. The facilitators in my adult group have essentially saved my life. Being with them allows me to exhale and breathe for the most important hour of my week, the only hour of my week I’m not holding my breath. The relief of the validation I receive from them helps me to know that what I’m feeling is normal. I am blessed and honored to know them and share space with them. They have helped me more than words could accurately convey.”

The facilitators in the “Littles” room are helping to heal [my son’s] little heart more and more as each week goes by. I have no idea what they do or talk about in that room, but he always leaves happier than when he first goes in. To have the support from the ‘littles’ facilitators has helped him navigate through the complexity and finality of death, an idea that even adults have difficulty understanding. He can now talk out loud about his loss with others. He still cries for his Umpi but seems to have a better understanding of what death and loss are.

I love the Center and all the amazing souls who share their experience, strength, and hope with each other. We are finally not alone; we have found our people.”

2023 Placements

FINANCIAL SERVICES

Position	Institution
Information Security Officer	Community Bank
Chief Operating Officer	Community Bank
AVP, Certified Financial Planner	Community Bank
President & CEO	Community Bank
President & CEO	Community Bank
Chief Banking Operations Officer	Community Bank
Senior Project Manager	Community Bank
Sr. Director of CRE Services	Community Bank
Chief Financial Officer	Community Bank
Chief Lending Officer	Community Bank
AVP, Commercial Loan Officer	Community Bank
Loan Servicing Manager	Community Bank
President & CEO	Community Bank
Chief Retail Lending Officer	Community Bank
Chief Retail Banking Officer	Community Bank
SVP, Retail Branch Network Manager	Community Bank
President & CEO	Community Bank
SVP, IT Services	Community Bank
SVP, Chief Financial Officer & Treasurer	Community Bank
SVP, Commercial Market Manager	Community Bank
Chief Financial Officer	Community Bank
SBA Division Head	Community Bank
SVP, Commercial Services Officer	Community Bank
SVP, Chief Information Officer	Community Bank
SVP, Commercial Market Manager	Community Bank
Senior Credit Analyst	Community Bank
VP, Information Technology	Community Bank
Chief Information Officer	Community Bank
AVP, Commercial Banker	Community Bank
SVP, Commercial Market Manager	Community Bank
VP, Director of Technology	Community Bank
VP, Compliance Officer	Community Bank
Board Member	Community Bank
Chief Information Officer	Community Bank
Chief Information Officer	Community Bank
Director of Commercial Credit	Community Bank
Information Security Officer	Community Bank
Head of Technology	Community Bank
Chief Banking Officer	Community Bank
Senior Commercial Credit Officer	Community Bank
President & CEO	Community Bank
Commercial Loan Officer	Community Bank
SVP, CISO	Community Bank

Position	Institution
Chief Technology Officer	Community Bank
SVP, Director of Operations	Community Bank
SVP, Chief Operating Officer	Community Bank
VP, Risk Management	Credit Union
Sr. Analyst FP&A	Credit Union
VP, Commercial Lending	Credit Union
VP, Human Resources	Credit Union
SVP of Culture	Credit Union
President & CEO	Credit Union
Director of Card Services	Credit Union
VP, Chief Risk Officer	Credit Union
Board Member	Credit Union
Board Member	Credit Union
Board Member	Credit Union
Chief People Officer	Credit Union
VP, Financial Crimes & Intelligence	Credit Union
Director of Collections	Credit Union
SVP, Member Business Lending	Credit Union
Controller	Credit Union
VP, Commercial & SBA Lending Manager	Credit Union
Director of Finance	Credit Union
VP, Lending Operations	Credit Union
VP, Information Technology	Credit Union
Chief Lending Officer	Credit Union
VP, PMO (Program Management Office)	Credit Union
Digital Fraud Investigator	Credit Union
VP, Compliance	Credit Union
Chief Member Experience Officer	Credit Union
Fraud Investigator	Credit Union
VP, Information Security	Credit Union
Chief Lending Officer	Credit Union
VP, Retail	Credit Union
Director of Audit	Credit Union
AVP, Risk Management	Non-Profit
General Counsel	Non-Profit
Director of Deposit Operations	Non-Profit
AVP, Education Partnerships	Non-Profit
VP, Government Affairs	State Banking Association

Position	Institution
Chief Technology Officer	Community Bank
SVP, Director of Operations	Community Bank
SVP, Chief Operating Officer	Community Bank
VP, Risk Management	Credit Union
Sr. Analyst FP&A	Credit Union
VP, Commercial Lending	Credit Union
VP, Human Resources	Credit Union
SVP of Culture	Credit Union
President & CEO	Credit Union
Director of Card Services	Credit Union
VP, Chief Risk Officer	Credit Union
Board Member	Credit Union
Board Member	Credit Union
Board Member	Credit Union
Chief People Officer	Credit Union
VP, Financial Crimes & Intelligence	Credit Union
Director of Collections	Credit Union
SVP, Member Business Lending	Credit Union
Controller	Credit Union
VP, Commercial & SBA Lending Manager	Credit Union
Director of Finance	Credit Union
VP, Lending Operations	Credit Union
VP, Information Technology	Credit Union
Chief Lending Officer	Credit Union
VP, PMO (Program Management Office)	Credit Union
Digital Fraud Investigator	Credit Union
VP, Compliance	Credit Union
Chief Member Experience Officer	Credit Union
Fraud Investigator	Credit Union
VP, Information Security	Credit Union
Chief Lending Officer	Credit Union
VP, Retail	Credit Union
Director of Audit	Credit Union
AVP, Risk Management	Non-Profit
General Counsel	Non-Profit
Director of Deposit Operations	Non-Profit
AVP, Education Partnerships	Non-Profit
VP, Government Affairs	State Banking Association

INSURANCE PRACTICE

Position	Institution
Industry Solutions Product Leader	Insurance Association
Strategic Operations Analyst	Insurance Carrier
Strategic Operations Analyst	Insurance Carrier
Senior Insurance Product Manager	Insurance Carrier
Member Relationship Director	Insurance Carrier
US Controller	Insurance Carrier
Head of Compensation	Insurance Carrier
Senior Insurance Product Manager	Insurance Carrier
Underwriter	Managing General Agency
VP, Finance	Managing General Agency
Program Underwriter	Managing General Agency
Senior Production Underwriter	Managing General Agency
Manager, Business Analyst	Managing General Agency
Wholesale Account Executive	Managing General Agency
Business Analyst	Managing General Agency
Actuary Vice President	Managing General Agency
Agency Operations Leader	Managing General Agency
Professional Liability UW	Managing General Agency
Business Analyst	Managing General Agency
Habitational Underwriter	Managing General Agency
Claims Adjuster	Managing General Agency
Habitational Property Underwriter	Managing General Agency
Staffing Services Program WC Underwrite	Managing General Agency
EVP, Operations	Managing General Agency
ARS President & COO	Managing General Agency
Senior Underwriter	Managing General Agency
Senior Underwriter	Managing General Agency
Business Development Manager	Managing General Agency
EVP, Human & Social Services UW Leader	Managing General Agency
Team Lead, Senior Underwriter	Managing General Agency
Senior Underwriting Auditor	Managing General Agency
Employee Benefits Account Manager	Managing General Agency
Senior Account Manager	Managing General Agency
Director of IT	Program Administrator
VP, Claims	Program Administrator
VP, Allied Health Insurance Program	Program Administrator
Associate Partner	Reinsurance Broker

ENGINEERING PRACTICE

Position	Institution
Senior Engineer	Engineering (Water)
Civil Engineer	Environmental Services/Engineering
Senior Project Manager	Environmental Services/Engineering
Landscape Designer	Environmental Services/Engineering/Planning
Project Engineer	Environmental Services/Engineering/Planning
Senior Project Engineer	Environmental/Engineering/Planning
City Engineer	Municipality
Water Distribution Systems Engineer	State Utility Company
Environmental Scientist	Consulting Firm
Architect Designer	Consulting Firm
Construction Manager	Consulting Firm





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SMITH & WILKINSON
PARTNERS IN TALENT