

Wilbanks Partners Track Record



Selected Representative Assignments

Board of Directors

Major Independent Investment Firm
Member, Board of Directors (3)
 Major Private Equity Firm
Member, Advisory Board
 Investment Software Services Company
Member, Board of Directors (5)
 Large Global Public Investment Firm
Chairman
 Global Public Investment Management Firm
Member, Board of Directors
 Large Mutual Fund
Independent Trustee (3)
 Major Financial Services Industry Association
Member, Board of Directors (2)
 Global Financial Services Association
Board Governance Study & Member Assessment

CEO / COO

Major OCIO Firm
Chief Executive Officer & President
 Leading ESG Investment Firm
Chief Executive Officer
 Major Wealth Management Firm
President & Chief Operating Officer
 Major Financial Services Association
President & Chief Executive Officer
 Major Financial Services Association
President & Chief Executive Officer
 Major Financial Services Trade Association
President
 Major Financial Services Trade Association
President & Chief Executive Officer
 Large Global Public Investment Firm
President & Chief Executive Officer
 Major Global Diversified Investment Firm
President – Hedge Fund of Funds
President – Retirement Services
 Significant Ultra HNW Boutique Private Bank
President & Chief Executive Officer
 Large Mutual Fund Company Subsidiary
President & Chief Executive Officer
 Investment Analytics Software Co.
President & Chief Executive Officer
 Major Family Office
Chief Executive Officer (2)
 Major Family Office
Chief Executive Officer
 Major Family Office
Chief Executive Officer

Chief Investment Officer

Major Regional Bank
CIO – Investment & Wealth Management
 Significant Ultra HNW Boutique Private Bank
Chief Investment Officer
 Leading ESG Investment Firm
Chief Investment Officer
 Major Community Foundation
Chief Investment Officer
 Major Hedge Fund
Managing Director & CIO
 Major Investment Firm
Chief Investment Strategist & Head of Investment Operations
 Major Pension Fund
Director of Alternative Investments
 Boutique Value Investment Firm
Chief Investment Officer
 Major European Investment Firm
MD & CIO Hedge Fund of Funds – US
 Large Family Office
Chief Investment Officer

Equities

Major Investment Firm
Deputy Chief Investment Officer
 Major Private Bank
Senior Portfolio Manager & Head of Small Cap
 Boutique Value Investment Firm
Deputy Chief Investment Officer
 Large Multi-Family Office
Investment Director – Fund of Funds
 Large Hedge Fund
Head of Equity Research
 Large Mutual Fund Company
Retailing Analyst
Technology Analyst

Fixed Income

Major Global Diversified Investment Firm
MD & Head, Global Fixed Income
MD & Portfolio Manager
 Large International Insurance Company
Senior Credit Portfolio Manager
Senior Credit Research Analyst
 Large Hedge Fund
MD & Head of Fixed Income Strategies
 Leading Independent Global Asset Manager
Sr. Portfolio Mgr – Emerging Market Debt
 Major Hedge Fund of Funds
Senior Analyst – Manager Assessment (3)

Institutional Sales & Marketing

Major Investment Firm
Managing Director & Head of DCIO Sales
 Large Diversified Investment Firm
Director, Head of Insurance & Sub-Advised Sales Channel
 Major Independent Investment Firm
EVP & Division Executive, Defined Benefits Administration
 Leading ESG Investment Firm
SVP & Head of Pension Sales/Consultant Cvrgr
 Global Large-Scale Diversified Asset Manager
MD – Middle Market Pension Sales
 Major Investment Firm
MD & Head of Institutional Distribution
 Major Private Equity Firm
Partner – New Business Development
 Alternatives Fund of Funds
MD & Head of Sales and Client Service
 Major Global Diversified Investment Firm
MD & Chief Marketing Officer – Institutional
 Major Investment Firm
VP & Chief Marketing Officer – Institutional
 Major Venture Capital Firm
Director, Head of Marketing & Client Service
 Major Global Asset Management Firm
Senior Institutional Equity Sales
Specialist & Client Portfolio Manager
 Large Hedge Fund
VP – Client Services Relationship Manager
 Large Investment Management Firm
Director – Pension Consultant Relations
 Large Life & Annuity Insurance Firm
Marketing Director – Pension Sales, Midwest
 Large Diversified Investment Firm
SVP & Head of Northeast Regional Sales
 Large US-Based Investment Manager
MD & Head of Client Solutions
 Mid-Size Global Equity Manager
Partner & Head of Marketing & Client Service

Quantitative Investments

Global Quantitative Equity Investment Manager
Global Chief Investment Officer
 Major Independent Mutual Fund Firm
MD & Head of Quantitative Equity Investing
Senior Quantitative Research Analyst (3)
Global Macro Economist (2)
 Absolute Return Hedge Fund
Quantitative Analyst
 Large Electronic Securities Trading Firm
Director of Financial Engineering
 Major Ratings Agency
Head of Hedge Fund Ratings

Retail Sales & Marketing

Major Investment Management Firm
President – Retail Distribution
 Major Private Equity Firm
Head of Retail Distribution
Head of National Accounts – Broker/Dealers & Private Banks
Chief Marketing Officer – Retail
 Leading ESG Investment Firm
EVP & Head of Distribution
VP & Head of Internal Sales Desk
 Major Investment Management Firm
MD & Head of Retail Distribution
 Major Global Asset Management Firm
MD & Head of Exchange Traded Funds
 Major Investment Management Firm
VP & Head of National Accounts
 Major Investment Management Firm
EVP & Head of e-Commerce
 Major Life and Annuity Insurance Company
SVP & Chief Marketing Officer
 Major Investment Firm
VP & Chief Marketing Officer – Retail
 Major Global Asset Management Firm
SVP – Digital Marketing
Global Head of Corporate Communications
 Major Investment Management Firm
Director – New Client Acquisition
Director & Chief Marketing Officer – Retail Client Segment
Director & Chief Marketing Officer – Digital & Social Media
Director & Chief Marketing Officer – ETF & Advisor Channel
 Major Public Investment Company
MD – Product Management & New Product Development
 Major Investment Firm
Director – New Product Development & Product Management
 Mid-Size Investment Firm
MD, National Product & Sales Manager
 Retail Investment Firm
Vice President – Sales, Central Region

Selected Representative Assignments

Wealth Management & Family Office

Major Wealth Management Firm
President & Chief Operating Officer
EVP & Chief Financial Officer
EVP & Chief Risk Officer
EVP & General Counsel
EVP & Head of Operations
EVP & Chief Information Officer
EVP & Head of Finance
EVP & Head of Service
EVP & Head of National Sales & Field Development

Major Regional Bank
President – Retail Brokerage Division

Money Center Bank
President – Retail Brokerage Division

Major European Private Bank
MD & Head of US Private Banking

Large Family Foundation
Chief Investment Officer

Large Family Office
Chief Executive Officer
Chief Investment Officer

Large Family Office
President

Large Family Office
President

Director of Investments

Large Family Office
Director – Manager Search & Evaluation

Large Multi-Family Office
Investment Director – Fund of Funds

Large Family Office
Head of Investments & Portfolio Administration

Mission-Driven Payments Fintech
Division Head & COO, RIA Business

Major Regional RIA
Chief Operations Officer

Mid-Sized Regional RIA
Head of Operations
Portfolio Manager

Technology and Operations

Major Wealth Management Firm
EVP & Head of Operations
EVP & Chief Information Officer
EVP & Head of Service

Major Independent Investment Firm
EVP – Enterprise Operations
EVP, Operations & Implementation, Retirement Business

Global Investment Management Firm
Chief Information Officer

Global Commodities Trading Services Firm
Chief Information Officer

Large Global Security Services Bank
SVP & Head of Product Management, Fund Services

Global FX Software and Trading Services Firm
MD – Americas Sales & Client Services
VP & Head of e-Commerce, Americas

Large Financial Services BPO Firm
GM – Enhanced Shared Services

Large Public Diversified Investment Firm
Group Manager – Middle Office Operations

Major Investment Management Firm
VP – Investment Operations Manager

Major Financial Svcs Compensation Consultant
VP – Technology & Operations Consulting

Major Investment Services BPO Firm
VP – Marketing Comm. & Brand Management
VP – Digital & Social Marketing

Middle Office Software Company
VP – New Business Development

Product Manager

Major Regional RIA
Chief Operations Officer

Mid-Sized Regional RIA
Head of Operations

Corporate Officers

Major Investment Management Firm
Chief Financial Officer

Major Wealth Management Firm
EVP & Chief Financial Officer
EVP & Head of Finance

Major Life & Annuity Insurance Company
Chief Financial Officer
SVP, Corporate Controller & Deputy CFO

Major Independent Investment Firm
Chief Actuary – Defined Benefit Consulting
Head of International Audit

Large Global Private Equity Firm
Chief Administrative Officer

Major Global Asset Management Firm
Global Head of Public Relations

Large US-Based Investment Manager
Director of Global Human Resources

Global Middle-Market Investment Bank
Chief Human Resources Officer

Mid-sized Independent Investment Manager
Chief Human Resources Officer

Major Family Office
Chief Financial Officer

Sustainability Private Equity Firm
Director – Treasury Services

Legal, Risk Mgmt & Compliance

Major Wealth Management Firm
MD & Chief Risk Officer
MD & General Counsel

Major Life & Annuity Insurance Company
SVP & Chief Risk Officer

Large Global Insurance Firm
Head of Risk Management – Hedge Fund of Funds, US Investment Division

Major Investment Management Firm
EVP & General Counsel
SVP & Head of Risk Mgmt, Quantitative Research & Product Development

Major Pension Fund
Vice President – Investment Risk

Major Hedge Fund of Funds
Senior Analyst – Risk Management

Diversity

Major Regional Bank
CIO – Investment & Wealth Management

Major Wealth Management Firm
MD & Chief Risk Officer

Global Public Investment Management Firm
Member, Board of Directors

Large Mutual Fund
Independent Trustee (3)

Leading ESG Investment Firm
EVP & Head of Distribution
SVP & Head of Pension Sales
VP & Head of Internal Sales Desk

Significant UHNW Boutique Private Bank
Chief Investment Officer
Managing Director & Head of Client Service

Major Independent Investment Firm
Member, Board of Directors
Principal – Institutional Strategic Consulting
Principal & Head of Quantitative Equities
Head of International Audit
Director & CMO – Digital and Social Media
Senior Quantitative Research Analyst
Quantitative Research Analyst
Investment Analyst
Global Macro Economist

Major Community Foundation
Chief Investment Officer

Major Independent Investment Firm
EVP, Operations & Implementation, Retirement Service Business

Major Investment Firm
VP & Chief Marketing Officer – Institutional
VP & Chief Marketing Officer – Retail

Major Global Asset Management Firm
SVP – Digital Marketing

Major Pension Fund
Director of Alternative Investments

Major Global Asset Management Firm
Senior Institutional Equity Sales
Specialist & Client Portfolio Manager

Mid-Size Global Equity Manager
Partner & Head of Marketing & Client Service

Large International Insurance Company
Fixed Income Portfolio Manager
Fixed Income Credit Analyst

Investment Analytics Software Company
Head of Sales

Middle Office Software Company
Product Manager

Large Family Office
Director of Investments

Large Family Office
Head of Investments & Portfolio Administration



Selected Representative Diversity Recruitments

Asset & Wealth Management

Board of Directors

Major Global Private Equity Firm
Member, Board of Directors & Chair of Audit Committee
Major Independent Investment Firm
Member, Board of Directors
Global Public Investment Mgmt Firm
Member, Board of Directors
Large Mutual Fund
Independent Trustee (3)
Major Financial Services Industry Association
Member, Board of Directors

Chief Investment Officer

Major Regional Bank
CIO – Investment & Wealth Mgmt
Significant UHNW Boutique Private Bank
Chief Investment Officer
Major Pension Fund
Director of Alternative Investments
Major Community Foundation
Chief Investment Officer
Large Family Office
Director of Investments
Large Family Office
Head of Investments & Portfolio Administration

Institutional Sales & Marketing

Major Independent Investment Firm
EVP & Division Executive, Defined Benefits Administration
Leading ESG Investment Firm
SVP & Head of Pension Sales
Mid-Size Global Equity Manager
Partner & Head of Marketing and Client Service
Major Investment Firm
VP & Chief Marketing Officer – Inst'l
Investment Analytics Software Company
Head of Sales
Major Global Asset Management Firm
Senior Institutional Equity Sales Specialist & Client Portfolio Manage

CEO / COO

Major Family Office
Chief Executive Officer
Large Family Office
President & CEO

Equities

Major Independent Mutual Fund Firm
MD & Head of Quant. Equity Investing
Sr. Quantitative Research Analyst (3)
Global Macro Economist (2)

Retail Sales & Marketing

Leading ESG Investment Firm
EVP & Head of Distribution
Head of Internal Sales Desk
Major Global Asset Management Firm
SVP & Head of Retail Marketing
Major Investment Firm
VP & Chief Marketing Officer – Retail
Major Global Asset Management Firm
SVP – Digital Marketing
Major Investment Management Firm
Director & Chief Marketing Officer – Digital and Social Media
Significant UHNW Boutique Private Bank
Managing Director & Head of Client Service
Mid-sized Investment Firm
ETF Product Manager

Corporate Officers

Major Independent Investment Firm
Head of International Audit
Major Wealth Management Firm
MD & Chief Risk Officer
Mid-Sized Global Investment Manager
Director of Human Resources
Mid-sized Independent Investment Manager
Chief Human Resources Officer

Fixed Income

Large International Insurance Company
Senior Credit Portfolio Manager
Senior Credit Research Analyst

Technology and Operations

Major Independent Investment Firm
EVP, Operations & Implementation, Retirement Business
Middle Office Software Company
Product Manager

Wilbanks Partners: Selected Mission-Driven Assignments

Client	Role
Greenbacker Capital	Member – Board of Directors & Chair of Audit Committee
Morningstar Funds Trust	Independent Trustees (2)
True Link Financial	Head of RIA Platform
The Investment Fund for Foundations (TIFF)	President
Sustainability Accounting Standards Board (SASB)	Member, Board of Directors (2)
Insured Retirement Institute (IRI)	President & Chief Executive Officer
Money Management Institute (MMI)	President & Chief Executive Officer
National Investment Company Services Assoc. (NICSA)	President
The New York Community Trust	Chief Investment Officer

Wilbanks Partners: Selected Mission-Driven Assignments

Client	Role
International Swaps & Derivatives Association (ISDA)	Chief Executive Officer Vice Chairman & Head of International General Counsel
Investment Company Institute (ICI)	EVP & Chief Operating Officer General Counsel Managing Director & Head of Europe Head of Member Services