

SMITH & WILKINSON

PARTNERS IN TALENT
2021 ANNUAL REPORT





2021 was a high-water mark for Smith & Wilkinson, our best year in terms of number of completed searches, number of leadership development engagements, size of our team, and total revenue. I share these results with humility and gratitude, in the shadow of the tremendous difficulties, sacrifices, and social disruption both necessitated and wrought by the pandemic. Our success is the result of the values, focus, and commitment of our team, and the loyalty, partnership, steadfastness of our clients. We are all truly Partners in Talent.

Much has been made over the past year about the “Great Resignation,” and while it’s not entirely straightforward to separate the reality from the hype, it seems undeniable that the expectations and attitudes of large segments of our working population have changed in deep and meaningful ways.

Because of the nature and demographics of our economy, most of the people leaving the workforce or switching jobs are hourly workers looking to better their wages, make their hours more predictable, or improve their working conditions, and this logic seems straightforward. Basic human needs have to be met.

But we’re also seeing highly skilled and highly compensated employees reconsidering their relationship with work, and their relationship with the culture of their organization. The most clear-cut example of this is the unfolding discussion around work-from-home / work-from-work expectations. Many organizations (ours included) have decided that having a rich corporate culture requires people to physically spend time together, because bonds are built in ways big and small, visible and invisible, through shared time. On the other hand, many skilled employees are asking, quite reasonably (in my opinion), why, having worked successfully with near total independence for the past few years, they should be required to be in physical attendance in a way that restricts their autonomy.

The whole concept has gotten me thinking of the nature of meaningful work and employee motivation, and the way that successful cultures need to balance the needs of the organization with the needs of the individual in a way that is, if not perfect, at least fair. What is it that makes one’s work meaningful? What is it that motivates a person to achieve beyond their most basic human needs? What is it that connects an individual to the group?

My working hypothesis is that it is some combination of the following:

- 1) The opportunity for a person to incrementally improve in the performance of their duties in a way that allows that person to achieve increasing levels of **mastery** in their role/career.
- 2) **Clarity of purpose**, at the level of the role and the level of the organization, so that a person truly understands the why that drives the what of the organization.
- 3) **Fairness and transparency** in all interactions, with a recognition of conflicts of interest, so that corporate decisions (even if unpopular) follow a logical path rather than appearing arbitrary.
- 4) The opportunity for everyone to have reasonable and increasing levels of **autonomy** in the execution of tasks and initiatives, and in their working environment, in a way that respects their growing capabilities and individual needs and values.
- 5) **Recognition** for contributions, large and small, which lead to the collective success of the institution.
- 6) Meaningful face-to-face **relationships** with colleagues, so that work does not simply become a series of daily tasks and transactions, but a shared human experience.

I’m optimistic about 2022, and I’m challenging myself to think through these six dimensions in everything that we do and for everyone who chooses to be part of the S&W family. And speaking of the S&W family, we had the pleasure of welcoming **Nate Townsend and Ben Chadwick** onboard as the two newest Partners at S&W. Please join me in congratulating them!

In closing, thank you all for letting us be a small part of your success.

Sincerely,
Carll Wilkinson



Founded in 1998, Smith & Wilkinson is a premier Talent Advisory consultancy that supports 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, Succession Planning, and Compensation Consulting, delivered through specialty teams and industry experts, providing a comprehensive suite of solutions, innovations, and best practices that help our clients thrive.



Executive Search

Executive Coaching

Group Leadership Development

Succession Planning

Compensation Consulting



Leadership Development & Organizational Design

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 supports limitations to drive superior performance.

Group Leadership Development

High-potential employees are yearning for professional development opportunities, and small-group leadership development is a cost-effective way to build skills, and shape a learning and development culture, in a way that yields material results. We offer a curriculum-based approach that supports the development of intermediate and advanced leadership skills, with a level of depth and quality that most small and mid-sized organizations aren't able 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 business 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, where key employees are exposed to growth opportunities, leadership techniques and philosophies, and stretch projects to build capacity.

Compensation Consulting

Compensation plans drive behavior, performance, retention, and culture. Smith & Wilkinson brings best-practices and unparalleled competitive insight to assist our clients in establishing comprehensive compensation philosophies and programs that get results.



Sharon Dorsett
Leadership Consultant



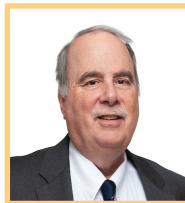
Wade Shows
Leadership Consultant



Beth Symes
Leadership Consultant



Charlotte Anderson
Leadership Consultant



Vince Pelote
Leadership Consultant

Client Spotlight



Howard Brady, President & Chief Executive Officer



What are you most personally excited about tackling in your new position as President and CEO?

There are so many things that get me excited to come to work every day. The single most important thing in our business is the people—members and employees. We want to do two things in particular—anticipate our members' financial needs and develop our employees to reach their fullest potential. If we can do those things incredibly well, the Credit Union will deliver on its mission and achieve unparalleled success for all stakeholders.

How do you see American Eagle's mission evolving under your leadership?

We recently redefined our mission at American Eagle—we have a mandate to create a world where financial freedom is a reality for the communities we serve. The beauty and the challenge of that statement is that financial freedom and its meaning are unique to each person. The focus for us at American Eagle will be measuring our mission. More specifically, we want to effectively qualify and quantify our impact more than we ever have before.

Tell us about the culture of the credit union? What makes it a special place?

We have a strong culture at American Eagle and it is getting stronger. We are proud of our culture here which is illustrated by our values of caring, trust and dependability. Whether serving our members or supporting each other, these values come to life in our daily work at the Credit Union. We also take great pride in high levels of employee engagement supported by transparency, development and recognition of work done well. Our culture is uniquely ours, it is the one thing that can't be bought, sold or replicated. Simply stated, our culture is a competitive advantage in the marketplace.

What is the best piece of leadership advice you've received over the course of your career?

My greatest learning is that leadership is a choice, not a title or a position. The greatest fallacy in business is that employees need a title or power to wield influence or make an impact. Leadership is illustrated at all levels of an organization from the boardroom to the janitor's closet. We are all leaders.

Tell us about your experience with executive coaching

Our coaching engagement was a year long journey and investment that yielded positive outcomes for our company. We had four executives in the coaching program supported by Smith and Wilkinson. As an individual, my experience was a positive one illustrated by open, honest and deep dialogue around structured topics such as psychological safety, deepening commitment, strategic thinking and increasing influence to name a few in the robust curriculum. Equally important, my coach Wade Shows was always ready to go in the direction that I wanted to explore in the process of self-discovery, growth and development. Moreover, it was the trust that we were able to build throughout the process that made the engagement so fruitful.

From a group perspective, our team at American Eagle really wanted to get all the value we could out of the coaching engagement and corresponding investment. In that spirit, we set up forums, for the four members of our team in the coaching program, to share some of our individual journeys in service to advancing the team. We were highly focused on building even deeper levels of trust, gaining clarity on the most salient business issues, increasing commitment and accountability, as well as driving results.

The process started almost two years ago and we are still highly engaged on this journey. Just like anything in life, you get what you put into it. We are pleased with the results—continue to partner with Carl and Wade—and look to the future for individual, as well as collective growth opportunities.

Financial Services

S&W's Financial Services Practice serves community and regional banks, credit unions, FinTech's, industry-specific solutions providers, associations, community & economic development organizations, and GSE's. In 2021 our team successfully completed 84 searches nationally.

While we call ourselves executive recruiters, I actually think we are part of a much older tradition, that of storytellers. We tell our client's stories, their history, their culture, their challenges, and their vision, in a way that hopefully captures the essence of what makes them special. And then we tell our candidate's stories, their career journey, their goals, their motivations, and their aspirations, in a way that hopefully captures what makes them, them.

Often, the stories don't align, they just don't fit together at that point in time, and this is for any host of reasons. But when the stories mirror and complement each other, that's where great placements are made.

In ways large and small, everyone's story has changed over the past two years as a result of the pandemic, and this is exciting and nerve racking in equal measure. If a company is no longer exclusively a group of people gathered together in the same building between the hours of 8 to 5, then what is it? If over the course of a day you start work at 5 AM, bring your kids to school, conference in for a series of meetings, go grocery shopping, and respond to emails while watching TV at night, where do work and life begin and end?

These stories are still being written, and who knows what the future holds? But in times of flux people and organizations that can successfully adapt by responding in a dynamic way to market conditions will thrive. The companies and candidates that will succeed in in a hyper competitive economy and talent market are those that are willing to change pieces of their story.

Our story as a practice changed in some great ways in 2021. I'd like to thank and to congratulate my Partners and colleagues for going above and beyond on behalf of our clients and candidates. I'd also like to welcome Moriah Maron and Zach Zimmerman as Associates in the practice, and thank them for making their story part of ours. And finally, I'd like to express my gratitude for those companies and candidates that allowed us to tell their story in 2021, the best year in S&W history. -Cameron Boyd, Managing Partner, Financial Services Practice



Cameron Boyd
Financial Services
Managing Partner



Chris Kelley
Financial Services
Senior Partner



Steve Peary
Financial Services
Partner



Nick Hayes
Credit Unions, Financial Services
Partner



Nate Townsend
Financial Services
Partner



Zach Zimmerman
Financial Services
Associate



Moriah Maron
Financial Services
Associate

Client Spotlight



Lesa Vanotti, President & Chief Executive Officer



How did you end up becoming a banker and why would you recommend banking as a career for young people today?

I tell people I'm an accidental banker. I took a job at TSB in the accounting department to keep busy while my children were small. Like so many other bankers, TSB provided me numerous opportunities to advance personally and professionally so I stayed. I celebrated my 25th anniversary with the Bank in 2021. Banking provides a broad array of opportunities for people starting out in their careers. Many people don't realize there is an entire corporate ecosystem behind the teller line. Banks need IT, accounting, HR, risk management, marketing, facilities, and operations support staff just like other industries. It's a great place for young people who may not be sure where they are headed to explore different opportunities.

What is Torrington Savings Bank doing to improve the lives of your customers?

As a mutual bank, we operate for and in the best interests of our customers, not shareholders. Key to TSB's mission is that we help our families and business customers achieve their financial goals by offering best in class products and beneficial rates. We further support our communities by providing local organizations with resources that include financial support and volunteer hours from our staff.

What are you most excited about for Torrington Savings Bank in 2022?

First and foremost, that the pandemic gets under control, and we can resume some level of normalcy in our lives and our operations. Beyond that, TSB embarked on a 3-year journey in 2019 to strengthen our technology, human resource, and physical infrastructure. Most of those projects wrapped up in 2021 so now the focus is on our strategic plan of building our commercial loans and treasury services business lines, growing residential mortgage market share, and offering best in class digital tools to our customers.

What are you most passionate about outside of work? My work in the community. There are so many local organizations providing much needed services with limited resources. Being able to give back with my time and training to help them further their missions is fulfilling.

What are the best parts of your culture for which you are most proud?

We have been able to maintain the feeling of community and family despite changes in the organization, the industry and society. We value the trust our customers place in us and don't take it for granted. Each employee knows when they come to work every day, it is because the community allows us to do so.

What is the best part of working at Torrington Savings Bank?

The Bank's commitment to the success of the families and businesses who bank with us and the communities we serve. Our staff can come to work every day and know they can make a difference. It's the foundation of community banking and our team delivers on that promise every day.

What's the best piece of leadership advice you wish someone had shared with you sooner?

There is a difference between management and leadership, and it takes a village. The best leaders know the difference and know that they do not lead in a vacuum.

How is Torrington Savings Bank giving back to the community in 2022?

We have a long tradition of supporting our communities financially and with our human capital. Our employees and Trustees serve on numerous boards and committees throughout our footprint. That commitment will continue this year with a renewed focus. We established a Community Outreach function this year that will track our initiatives and ensure we are making the greatest positive impact on our local organizations.



Insurance Practice

S&W's Insurance Practice serves MGAs, carriers, insurtech companies, industry-specific solutions providers and consultants, brokers, and the reinsurance space. In 2021 our team successfully completed 40 searches nationally.

In 2015 we established Smith & Wilkinson's Insurance Practice because we saw a market opportunity to pair industry specific executive search services with a boutique client experience. Candidly, our vision was limited, though we knew we wanted to be an advocate and advisor for the sorts of companies we'd want to work for, with rich cultures, lofty ambitions, and visionary leaders.

What I could not have anticipated was the scale, dynamism, and innovative energy of the insurance industry ecosystem as a whole. This industry is reinventing itself, responding to the opportunities arising from new technologies, and the demands arising from customers who have become used to the ease of a digital first experience. Though our client base has become more and more diverse, from series A insurtech disruptors to storied legacy carriers, all are pushing themselves and their teams to adapt to the demands of the modern insurance marketplace.

Far from slowing things down, the last two years of the pandemic have accelerated change and innovation. We've responded in kind, expanding our team to meet our client's needs and expectations, including establishing a new focus area in specialty commercial insurance, where we are assisting next-generation, technology first carriers build out best-in-class teams to disrupt the traditional market.

I'd like to recognize my partner Stacy St. Onge, and her team of Associates, Christian Homlish and Katie Hاديaris. Like your business, our business is only as good as our people, and I'm proud to say we have the best.

Thank you to our clients, candidates, and friends of the firm. We are so grateful to everyone who has been a part of our journey, and looking forward to great things ahead. -Ken Jordan, Managing Partner, Insurance Practice



Ken Jordan
Insurance Practice
Managing Partner



Stacy St. Onge
Insurance Practice
Partner



Christian Homlish
Insurance Practice
Associate



Katie Hاديaris
Insurance Practice
Associate

Client Spotlight



Joe Zuk, Operating Partner



Tell us how you first became interested in insurance, what roles you've played, and why you ultimately made the transition over to private equity

I first became interested in insurance through my uncle, a CEO of a publicly-traded insurance carrier. He suggested I explore reinsurance brokerage as an alternative to investment banking, which started as an internship and quickly evolved into a full-time job within six months. After 15 years in the business, I became intrigued by the interest of private equity in the insurance services space. I developed a concept and a business plan and started cold calling private equity firms in the space. Eventually made an impression on one and, through persistency in bringing ideas and value, evolved into my role today.

Two of your prominent portfolio companies, Accelerant Holdings and Mission Underwriting Services, are creating a lot of buzz in the industry. To what do you attribute their success?

The success of Accelerant and Mission comes down to the execution of its people and the vision of its leadership. While there have certainly been some great market tail-winds, the leadership of both organizations combined with an exceptional talent team and a focus on executing the shared vision has resulted in differentiated performance in the market. We need to maintain this persistence consistently over the months and years to come. I am confident the team will continue to execute and build upon

Do you anticipate that the specialty insurance space will continue its rapid rate of growth in 2022?

I certainly do. The reason specialty insurance will continue to grow and evolve is it is most suited to adapting to the broader macroevolution of the economy. Furthermore, specialty insurance responds to the needs of insureds rapidly, and its ability to fill in areas of the market based on need and maintain sustainable market share will allow it to grow in 2022 and beyond.

How have Accelerant and Mission created a sense of culture in a high-growth, 100% remote environment?

Both organizations have fostered a sense of culture through consistent messaging of the shared vision. This begins from the top and permeates in everything we do. In addition, the team consistently collaborates weekly in small groups and larger group, including weekly all-hands discussions, monthly town halls, and free form discussions where managers are encouraged to connect with all parts of the organization. Lastly, despite the pandemic's challenges, the team has successfully hosted in-person company-wide get-togethers.

What are the key qualities that you feel will define future leaders in insurance?

Open mindedness is critical, followed by the natural curiosity of the broader world. Leaders will be defined by a willingness to learn both the operational side as well as the finance side of insurance. A diversified experience background will serve future leaders well.

Why should young professionals consider a career in the insurance industry, and what advice would you have for them?

Insurance should be considered by young professionals who have an interest in finance but are attracted to complexity of problem-solving, lateral thinking, and the importance of relationship development. I would suggest that young professionals identify mentors in different areas of the insurance industry and be open to networking, learning about the history of the business, and be willing to raise their hand to solve problems or challenges their current company faces – it opens up a world of possibility and the ability to rise quickly within the industry.

What keeps you excited about working in and around the insurance community?

Firstly, the people and the relationship aspect of the business is gratifying. Secondly, an ability to understand that insurance permeates every facet of life and commerce and serves as the oxygen of the economy operating in the background makes it particularly exciting to me. In addition, the fact that you never stop learning something new about insurance or an aspect of the industry and the entrepreneurialism that seemingly never ends is highly engaging – one of the best secrets in business, in my view!



Engineering Practice

S&W's Engineering Practice serves wastewater, site civil, community, and environmental services firms, municipal water districts, and industry-specific solutions providers and consultants. In 2021 our team successfully completed 12 searches nationally.

Over the holidays I was reflecting on my almost 4-year adventure with Smith & Wilkinson, leading the firm's entry into the engineering space. It's been a lot of work, a lot of fun, and such a privilege to work with some of the best mid-sized engineering firms in the country.

Our practice has continued to evolve, and we anticipate ongoing growth and diversification in 2022 and beyond. We now provide professional and executive-level search services to architecture, engineering and environmental consulting firms, municipalities, and utilities from coast to coast. We have completed assignments for all levels of positions from C-Suite, technical experts, project staff and shared services.

We are anticipating another strong year in 2022, and hope to add an Associate to the practice in order to continue to expand our client-service capabilities. Thank you to everyone who has supported the growth and success of the engineering practice. Cheers.
- Ben Chadwick, Partner, Engineering Practice.



Ben Chadwick
Engineering Practice
Partner

Operations Team



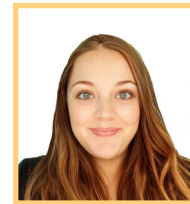
Carll Wilkinson
President & CEO



Quin Peel
Partner
Chief Operating Officer



Emily Belgard
Marketing &
Administration Manager



Kat Bridgewater
Operations & Data Manager

Client Spotlight



Stephen Ransom, Chief Executive Officer



How did you end up becoming a business and why would you recommend environmental services as a career for young people today?

For me, life is about balancing my personal passion for health and wellness with my professional goals. These must work hand in hand. Ransom Consulting was born on the premise of achieving that life balance with my professional work in engineering and environmental work and my passion for health, wellness and the outdoors.

What is Ransom doing to improve the lives of your clients, communities, or the environment?

As engineers and environmental consultants, we are constantly innovating resilient solutions for our clients and the communities where we work and live. And we do that in many ways. Through the cleanup of environmentally impacted areas, such as buildings, groundwater and soil, we support remediation projects. We collaborate with communities on how to best navigate and build infrastructure for all modes of transportation, including bike and walking paths. And we work in emerging technologies, such as land-based aquaculture, to innovate solutions for more sustainable food supplies.

What are you most excited about for Ransom in 2022?

I'm most excited about building on our 30+ years of experience as a trusted engineering and environmental partner with our commercial, governmental and industrial clients. We are always innovating to deliver sustainable and resilient solutions for our projects. And our team is growing in our six locations in Maine, New Hampshire, Massachusetts, Rhode Island and New Jersey.

What are you most passionate about outside of work?

Outside of work, I'm outdoors, running, biking and skiing. You'll find me on the mountain or in the water anytime of the year!

What are the parts of your culture for which you are most proud?

I'm most proud of how work/life balance is at the core of our team's culture. We are a progressive employer, supporting our employees' professional career growth and placing personal health and wellness as our top priority.

Tell us about your employees?

They are team players and they are constantly innovating, working together to solve our clients' biggest issues. We provide solutions through the entire life cycle of our client projects. And it's that team work that drives Ransom.

What is the best part of working at Ransom?

Innovation, not only for our clients but for ourselves as professionals and individuals. We support constant growth both professionally and personally. Innovation on every level is important to our team at Ransom.

What's the best piece of leadership advice you wish someone had shared with you sooner?

In terms of careers and professional growth, identify your personal and professional passions early and find a way to meld those together in your career. And if you can do that successfully, you can lead others from a place of balance and understanding.



Community Engagement

In 2021 Smith & Wilkinson was proud to donate over

\$50,000 to 18 local charities.

We hope to beat this amount in 2022 and continue to give back to our community



As Maine's only full-service children's hospital, The Barbara Bush Children's Hospital offers everything from well-child visits to specialized medical and surgical treatment of complex illnesses and injuries.



For more than 100 years, Boys & Girls Clubs of Southern Maine has provided youth development programs for young people, especially those who need them most. Their Clubhouses are safe places to learn, have fun and develop skills and interests.



Camp Sunshine is a year-round resort for children with life-threatening illnesses and their families to enjoy a camp experience in Maine.



The Center for grieving Children is an organization in southern Maine which supports children and families through peer support as they navigate the death or serious illness of a close family member.



Founded in 1997, WinterKids helps children develop healthy lifelong habits through education and fun, outdoor activity.



Full Plates Full Potential is a coalition of community leaders, stakeholders and advocates working to end child hunger in Maine



Rip it for Rett North is a charitable golf tournament held annually in support of RettSyndrome.org, funding research and resources for individuals living with Rett Syndrome.



The Pan-Mass Challenge is a fundraising bike-a-thon to benefit the Dana-Farber Cancer Institute via the Jimmy Fund. It raises more money than any other single athletic fundraiser in the country



The Joe Andruzzi Foundation (JAF) is committed to providing assistance to patients of all ages throughout New England who have fallen on financial hardships as a result of a cancer diagnosis



Pine Tree Society's mission is to provide Maine children and adults with disabilities the opportunities and the means to create better lives for themselves and their families.



Mass Bay Credit Union Charitable Foundation contributes both financially, and through volunteer efforts, to make their communities better places to live and work. Following the credit union ideal of "People Helping People," their Foundation and our teams strive to positively impact the communities we serve.



For over 70 years, Dana Farber has led the world by making life-changing breakthroughs in cancer research and patient care, providing the most advanced treatments available.



The Make-A-Wish® vision is to grant the wish of every child diagnosed with a critical illness. In the U.S. and its territories, a wish is granted every 34 minutes.



Preble Street Shelter works to provide accessible barrier-free services to empower people experiencing problems with homelessness, housing, hunger, and poverty.



The mission of Good Shepherd Food Bank is to eliminate hunger in Maine by improving access to nutritious food for people in need, building strong community partnerships, and mobilizing the public in the fight to end hunger.



At Hospice of Southern Maine, their mission is to provide compassion, care and comfort through end of life for patients with life-limiting illnesses, and support for their families.



The Leukemia & Lymphoma Society is at the forefront of the fight to cure cancer. They are the largest nonprofit dedicated to creating a world without blood cancers.



CATCH meets the needs of the communities it serves by constructing new affordable housing units and revitalizing existing housing in an area where affordable rental options are limited.



2021 Placement Statistics

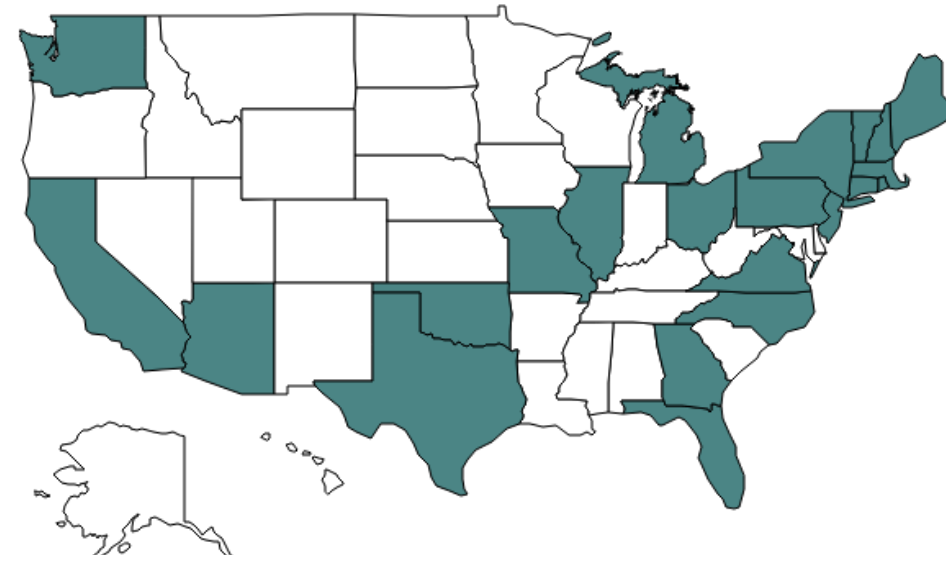
Executive Search

Executive Coaching

Group Leadership Development

Succession Planning

Compensation Consulting



In 2021, Smith & Wilkinson made over **137 placements** within **21 states**.



82 Organizations



13 Engineering Placements



24 C-Suite Placements



84 Financial Services Placements



40 Insurance Placements



2021 Placements

FINANCIAL SERVICES

Position	State	Institution	
EVP, Chief Operating Officer	ME	\$260 MM	Credit Union
Chief Human Resources Officer	CT	\$2.3 B	Credit Union
VP, Commercial Loan Officer-Remote	PA	\$730 MM	Community Bank
VP, Commercial Credit & Collections	ME	\$1.2 B	Community Bank
EVP, Chief Lending Officer	NJ	\$2 B	Community Bank
VP, Deputy Auditor	NJ	\$2 B	Community Bank
Team Leader, Commercial Loan Review	MA		Bank Consulting Firm
Chief Financial Officer	CT	\$1.5 B	Community Bank
Chief Lending Officer	MA	\$645 MM	Community Bank
Chief Lending Officer	VT	\$970 MM	Community Bank
Commercial Loan Officer	CT	\$1.1 B	Community Bank
VP, Senior Trust Officer	CT	\$1.1 B	Community Bank
Chief Executive Officer	CT	\$435 MM	FinTech
SVP, Chief Lending Officer	NY	\$1.95 B	Community Bank
Marketing Communications Manager	MA	\$1.8 B	Community Bank
Chief Operations Officer	IL	\$1 B	Credit Union
SVP, Operations Officer	MA	\$1.1 B	Community Bank
VP, Loan Servicing & Administration	MA	\$220 MM	Credit Union
AVP, Digital Marketing	NY	\$6.5 B	Credit Union
VP, Indirect Lending	MA	\$1.75 B	Credit Union
Senior Commercial Lender	CT	\$7.3 B	Community Bank
Senior Marketing Analyst	CT	\$7.3 B	Community Bank
SVP, Consumer Lending	CT	\$7.3 B	Community Bank
Chief Financial Officer	MA		State Banking Association
VP, Controller	MA	\$665 MM	Community Bank
VP, Real Estate Lending	MA	\$340 MM	Credit Union
VP, Commercial Loan Officer	NH	\$1.25 B	Community Bank
VP, Residential Mortgage Sales	NH	\$1.1 B	Community Bank
VP, Commercial Loan Officer	NH	\$1.1 B	Community Bank
VP, Controller	MA	\$1.2 B	Credit Union
VP, Operations Manager	MA	\$1.2 B	Credit Union
Controller	MA	\$575 MM	Community Bank
VP, Retail	MA	\$575 MM	Community Bank
Senior Learning Management & Design Specialist	NY	\$4.2 B	Credit Union
Talent Acquisition Manager	NY	\$4.2 B	Credit Union
HR Operations Specialist	NY	\$4.2 B	Credit Union
Senior Learning Specialist	NY	\$4.2 B	Credit Union
VP, Marketing	NY	\$4.2 B	Credit Union

Position

HR Operations Manager
HR Operations Manager
Director of Digital Strategy
VP, Consumer Lending
VP, Consumer Lending
Enterprise Applications Manager
SVP, Human Resources
SVP, Senior Trust Officer
Information Security Officer
Chief Commercial Banking Officer
VP, Commercial Relationship Manager
VP of Lending
Senior Commercial Banker
Information Security Analyst
VP, Commerical Banker
CRE Relationship Manager
Chief Lending Officer
Business Banking Manager
VP, Credit Officer
AVP Controller
Commercial Loan Officer
SVP, Commercial Loan Officer
Commercial Loan Officer
Wealth Consultant
Chief Information Officer
SVP, Team Lead, Commercial Loan Officer
VP, Commercial Loan Officer
VP, Chief Financial Officer
SVP, Chief Risk Officer
VP, Commercial Loan Officer
VP, Commercial Credit Manager
Network Systems Engineer
SVP, Commercial Lender
Branch Administrator
SVP, Senior IT & Operations Officer

State	Institution	
NY	\$4.2 B	Credit Union
NY	\$4.2 B	Credit Union
NY	\$4.2 B	Credit Union
NY	\$4.2 B	Credit Union
VT	\$1.9 B	Credit Union
VT	\$1.9 B	Credit Union
NH	\$3 B	Mutual Holding Company
NH		Financial Trust Company
MA	\$1.3 B	Community Bank
NH	\$1.2 B	Community Bank
NH	\$1.2 B	Community Bank
FL	\$310 MM	Credit Union
ME	\$810 MM	Community Bank
ME	\$810 MM	Community Bank
VT	\$870 MM	Community Bank
PA	\$2.7 B	Community Bank
MA	\$725 MM	Credit Union
MA	\$725 MM	Credit Union
MA	\$660 MM	Community Bank
MA	\$2.5 B	Credit Union
MA	\$5.8 B	Community Bank
MA	\$5.8 B	Community Bank
MA	\$5.8 B	Community Bank
MA	\$5.8 B	Community Bank
MA	\$5.8 B	Community Bank
MA	\$5.8 B	Community Bank
MA	\$5.8 B	Community Bank
ME	\$775 MM	Community Bank
NH		Higher Education Finance Company
CT	\$975 MM	Community Bank
CT	\$975 MM	Community Bank
CT	\$975 MM	Community Bank
VT	\$1.1 B	Community Bank
VT	\$1.1 B	Community Bank
VT	\$1.1 B	Community Bank
VT	\$1.1 B	Community Bank

2021Placements

FINANCIAL SERVICES

Position	State	Institution	
AVP, Portfolio Manager	OH	\$310 MM	Credit Union
VP, Business Banking Officer	OH	\$310 MM	Credit Union
Chief Operations Officer	NH		De Novo Bank In Formation
Commercial Loan & Credit Officer	NH		De Novo Bank In Formation
SVP, Chief Information Officer	MA	\$1 B	Community Bank
Director of Business Lending	MA	\$400 MM	Credit Union
Director of Business Lending	MA	\$605 MM	Community Bank

INSURANCE

Position	State	Institution	
Business Line Lead	AZ	Carrier	
Senior Member Manager	AZ	Carrier	
Senior Member Manager	AZ	Carrier	
Account Manager	CA	Carrier	
Manager	IL	Broker	
Corporate Controller	TX	Insurtech	
Controller	GA	Insurtech	
Chief Marketing Officer	NJ	Insurtech	
Analytical Account Manager	VA	Broker	
Head of Property & Cargo Underwriting	MA	Managing General Agency	
Chief Underwriting Officer	NY	Insurtech	
Media Underwriter	IL	Managing General Agency	
Employee Benefits Client Consultant	MA	Broker	
SVP, Head of Marketing	NY	Carrier	
Agent Appointment Manager	MA	Carrier	
Growth Partnership Manager	MA	Carrier	
Business Analyst	MA	Carrier	
AVP, Insurance Operations PM	MA	Carrier	
Chief Risk Officer	CT	Carrier	
PRT Pricing Assistant Actuary	CT	Carrier	
Director Financial Risk	CT	Carrier	
Director, Strategic Investments	CT	Carrier	
Sr. Sales Executive	MO	Insurtech	
Marketing Specialist	VT	Carrier	

INSURANCE

Position	State	Institution	
Senior Underwriter	VT	Carrier	
President of E&S	CT	Managing General Agency	
VP, E&S Casualty	CT	Managing General Agency	
E&S Casualty Underwriter	CT	Managing General Agency	
Senior Underwriter	CT	Managing General Agency	
Professional Liability UW A&E	IL	Managing General Agency	
Dealer Open Lot Underwriter	IL	Managing General Agency	
Product Underwriter	NY	Managing General Agency	
Automotive Partnerships	NY	Reinsurer	
Head of Insurance	NY	Insurtech	
VP of Insurance	TX	Broker	
Program Manager	NJ	Fronting Carrier	
Account Executive	MI	Managing General Agency	
Underwriter	NC	Managing General Agency	
Underwriter	GA	Managing General Agency	
Property Underwriter	IL	Managing General Agency	

ENGINEERING

Position	State	Institution	
Project Engineer	PA	Water Utility	
Area Manager II	PA	Water Utility	
Senior Industrial Hygienist	WA	Environmental Services	
Electrical Engineer	ME	Architecture/Engineering	
Senior Civil Engineer II	ME	Architecture/Engineering	
Planner - Cyber Security	MA	Environmenta Services/Engineering/Planning	
Emergency Response Planner	MA	Environmenta Services/Engineering/Planning	
HR Manager	ME	Environmental Services & Engineering	
Project Scientist 2	RI	Environmental Services & Engineering	
Senior Project Manager	NJ	Environmental Services & Engineering	
Project Scientist 2	ME	Environmental Services & Engineering	
Environmental Engineer	MA	Environmental Services/Engineering/Planning	
VP, Managing Engineer	MA	Environmental Services/Engineering/Planning	



- Executive Search
- Executive Coaching
- Group Leadership Development
- Succession Planning
- Compensation Consulting

The background of the slide is a photograph of a harbor scene, likely in Scarborough, Maine. In the foreground, a white boat with a cabin is docked at a wooden pier. To the left of the boat is a paved walkway with a black lamppost and some potted plants. In the background, several multi-story buildings are visible, including a prominent one with a grid-like window pattern. The entire image is overlaid with a semi-transparent blue filter.

SMITH & WILKINSON

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