



Senior Leadership Succession Planning

The Financial Services industry is facing a substantial succession bubble with an expected 50 percent board and senior management turnover by 2025, driven by generational and business model changes.

Does your company have confidence in the current leadership composition to guide your organization through the next five years?

Chartwell Partners' Financial Services Team offers succession planning advisory services to assist our clients in making confident leadership decisions.

Our four-step process includes:



Step 1: Intake

We meet with key stakeholders, such as the Chairman, Lead Director or CEO to understand the business objectives, the current leadership dynamic and unique cultural elements that drive effective leadership transition plans.



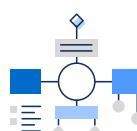
Step 2: Planning

We craft a tailored plan and define outcomes, outlining defined action plans and timeline. We partner with the decision-making team to provide guidance on executing against the defined plan, whether it's testing a current succession plan or executing internal leadership assessments and processes.



Step 3: Assessment

Leveraging our decades of in-person executive assessment experience, coupled with our data-driven online assessment service, we meet with the select executives and provide in-depth insights into the leadership team. We also provide perspective on your leadership team compared to outside executive options.



Step 4: Reporting

Following assessment, we provide a written report based on the desired outcomes defined by our client, which may include a well-defined succession plan or a guide to an internal leadership selection process. We tailor our reporting to your specific needs, so that your key stakeholders are confident in the executive leadership decisions.

We have helped numerous clients think through leadership transition plans, serving as a trusted third party to ensure confident decisions. **Let's make a plan for your future.**

Our Experience

\$25B BANK
Internal Chief Executive Officer selection process

\$10B PUBLIC BANK
Board of Director Succession plan

\$5B PUBLIC BANK
Board Governance Plan

\$1B PRIVATE BANK
Chief Financial Officer Succession plan

\$1B PRIVATE BANK
Chief Executive Officer Succession search

If you are interested in working with Chartwell Partners, let's connect.



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