Mary Smith

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### CAREER MAP

## Target Role

A senior leadership position in a business management, financial or operational role in a medium to large size financial services organization – COO, CFO, SVP

A senior business or financial management role, CFO/Treasurer, in a mid to large size publicly traded, non-financial corporation

CEO, COO or CFO position in a privately held company in the financial or non-financial services sector

## Target Organizations

Financial Institutions

* + Wealth Management, Treasury, Investment Banking or large operating   
    divisions of Canadian Bank
  + Insurance Companies
  + Mutual fund manufacturer
  + IDA/MFDA dealership or ICPM
  + Medium to large size credit unions
* Financial or operating division of a major Canadian publicly traded or privately owned non-financial services corporation

## Background

Over 20 years’ experience in financial services

15 years of progressive general management and senior executive responsibilities

Excellent background in critical business disciplines including finance, risk management, treasury, operations, information technology and human resources

Hands on experience in financial services regulation, compliance, and regulatory affairs

Active participant in industry committees, boards, and forums

Experienced at managing a variety of situations including turnarounds, new initiatives, mergers, acquisitions, consolidations, corporate reorganizations, and day-to-day operations

Proven ability to set direction, build consensus and effect change

## Differentiators

Unique combination of financial, operational, and regulatory experience and responsibilities

Experience with medium and large sized organizations, wholesale, and retail financial services

Strong general management, leadership and team building skills

Creative problem solver with demonstrated ability to excel in diverse roles and situations

Strong interpersonal and communications skills; comfortable in front of boards, executive management, clients, and front-line staff

## Specific Experience

Qr code

Description automatically generatedCOMPANY A – Executive Vice President and CFO, 20xx – 20xx

COMPANY B – Chief Operating Officer, 20xx – 20xx

COMPANY C – Vice President and Director, 20xx – 20xx

COMPANY D – Group Vice President, 20xx – 20xx