

## CASE STUDY

### Interview with \$90 Billion+ Bank Executive – Director of Affluent and Wealth Strategy, Sales and Service



## CHALLENGE

A \$90 billion+ bank needed to expand its HNW advisory team in Salt Lake City, Utah, with advisors experienced in managing clients with investable assets exceeding \$3 million. The candidates needed to hold a CFP designation to meet the bank's high standards for financial planning and client service. Finding talent in the Salt Lake City market with both technical qualifications and the right cultural fit proved particularly challenging.

## SOLUTION

The Anderson Search Group leveraged their expertise in financial services recruitment to identify CFP-qualified candidates with experience in HNW client management and alignment with the bank's culture.

## RESULTS

Through a tailored search process, The Anderson Search Group identified and secured highly qualified candidates who met the bank's technical and cultural requirements. The new hires quickly filled critical gaps in the advisory team, ensuring continuity of service for HNW clients and enabling the bank to capitalize on growth opportunities in the Salt Lake City market.

Tell us about the hiring situation within your financial institution prompting you to reach out to The Anderson Search Group.

We needed to expand our advisory team in Salt Lake City, Utah, with high-net-worth (HNW) advisors who have experience managing clients with investable assets exceeding \$3 million. Our primary focus was finding candidates with a CFP designation to ensure a high standard of client service and financial planning expertise.

In your opinion, what made this search so difficult?

The difficulty lay in identifying candidates with both the technical qualifications, such as the CFP designation, and the proven ability to work effectively with HNW clients. Additionally, sourcing talent in the specific Salt Lake City market with the right cultural fit for our organization added another layer of complexity.

Talk to us about the urgency of the search.

The search was time-sensitive as we had identified a gap in our advisory team that needed to be filled quickly to maintain our client service levels and capitalize on growth opportunities within the HNW market in Salt Lake City.

Why did you choose The Anderson Search Group?

We selected The Anderson Search Group due to their proven track record in executive search, their deep understanding of the financial services industry, and their ability to tailor their approach to meet the unique needs of our firm. Their reputation for delivering high-caliber candidates aligned perfectly with our requirements.

What does it mean to you to have a reliable recruiting partner specializing in commercial banking and also understands your culture?

Having a reliable recruiting partner who understands the nuances of our industry and culture is invaluable. It ensures that the candidates presented are not only qualified but also aligned with our organizational values and goals, streamlining the hiring process and fostering long-term success.



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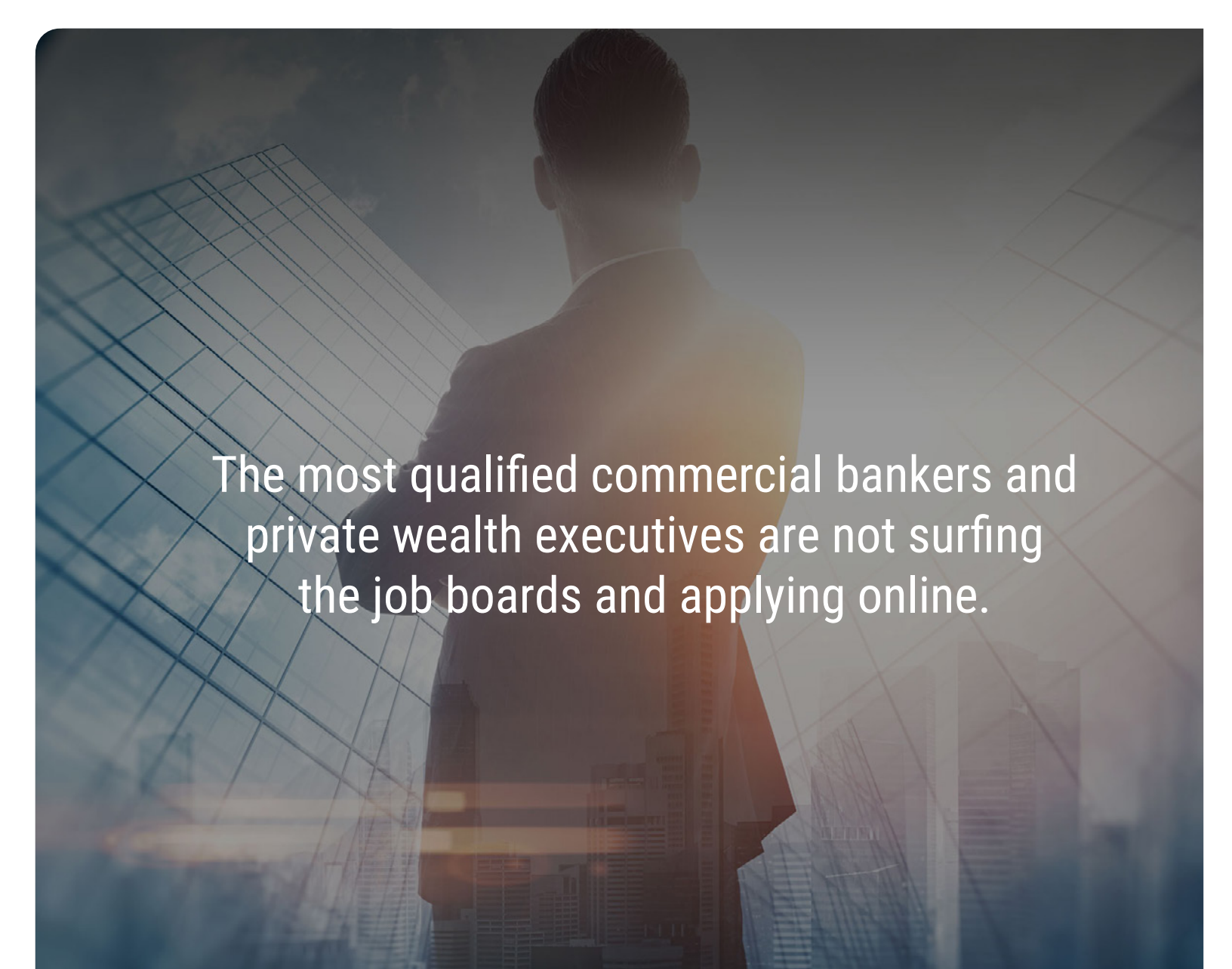
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The most qualified commercial bankers and private wealth executives are not surfing the job boards and applying online.

## ABOUT THE ANDERSON SEARCH GROUP

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Your institution needs a firm with a network able to bypass the unqualified, most available candidates and get to the passive, top performers.

Let The Anderson Search Group be your advocate. Let us tell your story to the market's elite talent.

Our firm specializes in placing elite talent and top performers in the commercial banking and private wealth arenas.

We have cultivated relationships with the most talented players in the field: commercial banking and private wealth executives who have proven track records for building top revenue generating portfolios of business and deep centers of influence in their respective markets.



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