

STANTON CHASE

Financial Services



STANTON CHASE

Stanton Chase is a global leader in executive search and leadership consulting with extensive experience across numerous industries and functions.

Established in 1990, Stanton Chase is a leading global executive search firm. With 350 expert consultants in over 70 offices across 45 countries, Stanton Chase is unique in the field of executive search, offering clients the global reach of one of the world's ten largest executive search firms, complemented by the industry expertise and personal relationships usually reserved for small boutique practices.

Our offices worldwide boast more than 350 senior consultants with unparalleled knowledge of their markets. Our specialists have a thorough understanding of our clients' industries, organizational and corporate cultures, competitive landscapes, strategies, and value propositions.

Strong collaboration and lasting relationships between our senior consultants ensure continued access to world-class candidates for our search engagements.

Internationally renowned research firms continuously rank Stanton Chase among the top executive search firms in terms of reputation and market share.

All of our consultants have extensive experience and key relationships in the industries in which they serve.

They are organized by industry and function to work as a seamless unit to understand client needs, analyze talent landscapes, and ensure an expeditious search process for each and every engagement.

Over 70% of our work comes directly from long-standing clients. We nurture relationships with clients and candidates through knowledge, ethics, professionalism, our consultative process, and our commitment to assembling world-class leadership teams.

Financial Services

Our Financial Services Practice Group consists of specialists with extensive experience all over the world.

The Group comprises more than 60 consultants from a wide range of financial services backgrounds.

Our consultants help you stay on the cutting edge of ongoing shifts in the Financial Services landscape, working closely with you to assess candidates' key experiences, core competencies, and leadership potential. By ensuring that your leadership teams are the best in the world, Stanton Chase secures your competitive advantage.

The Financial Services Practice Group works with both mature and growing businesses supporting search mandates for C-Suite, Senior Executives, and key leadership appointments. We concentrate our efforts and expertise in Asset Management, Wealth Management, Capital Markets & Investment Banking, Consumer & Commercial Banking, Technology Infrastructure, Fintech & Digital, Insurance, Private Equity & Family Offices, and Infrastructure Investment & Real Estate. Cross functionally we are closely supported by our CEO & Board Services, Marketing & Sales, CFO & Financial Executives, Human Resources, and Diversity and Inclusion Practices.



Our consultants help you stay on the cutting edge of ongoing shifts in the Financial Services landscape, working closely with you to assess candidates' key experiences, core competencies, and leadership potential.

STANTON CHASE

Asset Management

Our expert consultants serve the full spectrum of asset management clients, including both managers and owners. We understand the rapid transformation in the industry, particularly with AI and digitalization, and believe future growth will only happen by integrating leaders from other industries and sectors. The Stanton Chase global team gives us access to the top talent to fulfill your needs.

Wealth Management

Stanton Chase recognizes the increasingly global needs of wealth management services. Attention to regulatory requirements and other demands, as well as service quality, all play an important role in the partnership Stanton Chase has with its clients and in attracting top talent.

Capital Markets & Investment Banking

Our practice concentrates on senior-level, strategic hires and boasts experience in a variety of corporate advisory disciplines. We appreciate the challenges of a changing global economy, including strict regulatory requirements and developments in the digital world; we leverage our resources to attract top talent for your organization.

Infrastructure Investment & Real Estate

New trends and developments in infrastructure investment have evolved to the point where talent recruitment and acquisition is a greater challenge than ever in this sector. Our specialized consultants bring a wealth of experience in infrastructure and real estate in all areas of the globe. Our closely connected global offices bring you top leadership talent across the spectrum.

Technology Infrastructure, Fintech & Digital

Technology infrastructure, Fintech, and Digital advancements all play a key role in the Financial Services industry today. These advancements include AI, data analytics, Blockchain, and related hardware, software, services, and solutions. Our Financial Services consultants possess a deep understanding of these emerging technologies and liaise with other Stanton Chase practice groups to ensure the identification and recruitment of the best talent for your organization.

STANTON CHASE

Consumer & Commercial Banking

By focusing on people and skills management in the context of corporate strategy, we help our Consumer and Commercial Banking clients to grow their business in a unique way. Utilizing cutting-edge psychometric assessment tools, we ensure timely and effective evaluation of the best candidates from defined target markets whilst focusing on retained, long-term partnerships.

Trade & Commodity Finance

Stanton Chase is uniquely positioned in the international trade and commodity space, an area that is increasingly important in the Financial Services industry. Our expert consultants are poised to help your organization build leadership needs in this sector.

Insurance

Within the Insurance industry we work very closely with clients in the following segments:

- Property and Casualty
- Life and Annuities
- Specialty Carriers
- Health and Managed Care
- Reinsurance
- Brokers, Agents, and Underwriters
- Risk Management
- Services Companies for Domestic and Multinational Insurance

In addition to our deep Financial Services expertise, our team also works closely and seamlessly with the other specialist practice groups at Stanton Chase – these include Private Equity, CEO & Board, CFO & Financial Executives, Marketing & Sales, Human Resources, Diversity & Inclusion, and more.

For a complete and current listing of all industry and functional specializations, visit:

<https://www.stantonchase.com/specializations/>

Foundation of Success

Stanton Chase delivers commitment

More than 70% of our business is derived from repeat business with existing clients. We attribute this to the successful, long-term relationships we have forged with our clients.

True partnership

We consider our relationships with clients to be partnerships. Our senior consultants with the necessary subject-matter expertise interact closely with our clients to execute all searches with precision.

We offer our clients the benefits of a global firm, while we are locally structured to act and operate as a boutique. Extensive immersion is our policy – we get to know our clients in depth, becoming as familiar as possible with their culture and industry.

Candidates that fit the corporate culture

Our client relationships are not standard business relationships. We are our clients' trusted partner and understand their specific problems, as well as their business and culture, ensuring the selection of the best candidates with the best fit.

We identify the most important factors for success within an organization, involving the senior management team to identify the critical leadership practices. Then we go into great depth to analyze and understand each candidate – not just their past performance and track record, but also their character, background, and personality.

The result is fit-for-purpose leaders who are successful and loyal.

Full transparency

We realize that clear and open communication is paramount in our relationships. To avoid any potential misunderstandings and surprises, we proactively provide clients with complete transparency throughout the entire search process, ensuring the largest measure of integrity, honesty, confidence, and trust.

“Stanton Chase has a true understanding of my business; they are an extension of our culture.”

Our Unique Process

Consultative approach

Each engagement begins with in-depth interviews with key stakeholders. A position description is developed to identify the requisite experience, technical skills, and critical leadership competencies necessary for top performance.

Once finalized, we use this position description, along with an agreed-upon search strategy, as the foundation for the search. We are in constant communication with the client throughout the entire process, providing insights and analytics for benchmarking.

Talent attraction

Each engagement is customized and uses current research to identify suitable candidates. Our local consultants interact with the candidates in person, taking the utmost care to attractively present the opportunity to the best candidates. In this way, we are able to attract the best potential talent to perfectly fit the position.

Access to top talent globally

Our offices and partners worldwide give us the ability to access top talent across the globe.

Talent assessment

In-depth, face-to-face interviews enable us to further assess the candidate's level of experience, capabilities, and leadership competencies against key selection criteria in the position description. We leverage a range of assessment tools to provide better insight into a given candidate's motivations and odds for success in a specific position. Final recommendations are presented to the client, supported by detailed candidate profiles and evaluations of the candidate's strengths, weaknesses, and motivations.

“Stanton Chase really cares about us. They go the extra mile at every step of the process.”

STANTON CHASE

Talent acquisition

With top talent at a premium, a meticulous presentation of our client's organization and the available opportunity is vital. We carefully represent our clients in the marketplace and make the available position as attractive as possible for each identified candidate.

Based on the personal relationship our senior consultant forges with each candidate, we are able to gain a deep understanding of these individuals. We take great care in ensuring a perfect match between the candidate and our client's opportunity.

Candidate onboarding, integration and coaching

We work to understand the undercurrents of your organization and the implicit effect of policies and procedures. We identify the stewards of your corporate culture, the formal and informal influences, and the prevailing mindset of your company as an institution. This helps to ensure the successful onboarding of executive hires.

By means of early-stage engagement assessment, we make the necessary adjustments, manage expectations, and take immediate action to minimize gaps. We obtain feedback from trusted sources in order to help new team members become as effective and efficient as possible in the shortest period of time.

Our undivided attention

Specializing in senior executives, we accept only a limited number of engagements. This allows us to avoid conflict-of-interest issues and to focus on filling these highly exacting positions. As such, we are at our best when we function as trusted advisors to our most demanding clients.

If your company is seeking an expert consultant with the leadership skills to deliver more than just sound advice, Stanton Chase stands ready to fulfill your needs, every step of the way.



José Bancaleiro

Managing Director

j.bancaleiro@stantonchase.com

Lisbon

Ed. Einstein, Rua Teles Palhinha, 8, 3º
A

2740-278 Porto Salvo, Lisbon
Portugal

Phone: +351 210 937866

E-mail: lisbon@stantonchase.com

Porto

Edifício Gran Via Rua Eng.º Adelino
Amaro da Costa, 15, 6º Sala 6.2
4430 – 134 Vila Nova de Gaia, Porto
Portugal

Phone: +351 222 420 000

E-mail: porto@stantonchase.com

José has gained more than 25 years of experience as HR Director and VP in top companies, like Philip Morris, GlaxoSmithKline healthcare, Altitude Software, Essilor, OPCA (Engineering and Construction), and Banco Finantia (Investment Banking). He was also partner of the Lisbon office of Boyden.

A university teacher and conferencist, José has written three books and he regularly publishes management articles in several industry-specific magazines and newspapers. As a consultant, he works for some of the most important companies operating in Portugal as an executive search specialist and a top executive coach.

He received the first career award given to an HR Professional in Portugal and he was president of the Alumni association of Univ. Católica MBA. A Graduate in law and a former Judge, José holds and MBA in Marketing and he is finishing his PHD in labor sciences.



Asia/Pacific

Auckland · Bangalore · Beijing · Chennai
Hong Kong · Mumbai · New Delhi · Perth
Seoul · Shanghai · Singapore · Sydney · Tokyo

Europe, Middle East, Africa

Amsterdam · Athens · Belgrade · Brussels · Bucharest
Budapest · Copenhagen · Dubai · Düsseldorf · Frankfurt
Helsinki · Istanbul · Johannesburg · Lagos · Lisbon
Ljubljana · London · Lyon · Madrid · Milan · Moscow
Oslo · Paris · Porto · Prague · Sofia · Stockholm
Stuttgart · Vienna · Warsaw

Latin America

Bogotá · Buenos Aires · Lima · Mexico City
Montevideo · Panama City · Santiago · São Paulo

North America

Atlanta · Austin · Baltimore · Birmingham
Boston · Calgary · Chicago · Dallas · Detroit · Houston
Los Angeles · Memphis · Miami · Nashville
New York · Philadelphia · Raleigh · San Francisco
Silicon Valley · Toronto · Washington, D.C.

Your Leadership Partner