

Carter Sherwood

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HUMAN CAPITAL OPERATOR | FINANCIAL SERVICES | PERFORMANCE & REWARD |

Human capital solutions leader with a global track record of driving business improvement through workforce strategies related to performance and reward, talent selection and retention, and cost management. Proven success collaborating with executives and boards across the financial services industry. Expertise in operating model assessment, role clarification, performance and reward design, and talent development and recruitment.

KEY SKILLS

Business and Client Development | Workforce Solutions | Role Clarification | Benchmarking
Due Diligence | Sales Effectiveness | Market Insights | Trend Analysis | Recruiting

EXPERIENCE

AON, Human Capital Division, McLagan Stamford, CT Nov 2004 – Dec 2023
McLagan is the financial services industry-focused performance and reward solutions business within Aon's Human Capital Division

Associate Partner, Head of US Wealth Management, Stamford, CT, Jan 2013 – Dec 2023
Leader of the US Wealth Management practice overseeing ~\$5M in annual revenue

- Partnered with C-suite leaders at firms ranging from \$5B RIAs to multi-national banks to address human capital risks
- Led commercial efforts including client acquisition, account management, revenue growth, process and project management, product development, and team development
- Managed advisory relationships with wealth management clients spanning mass affluent through ultra-high net worth, delivering 10-20 bespoke consulting engagements annually

Select Projects

- **PE-Backed Broker Dealer:** Created a new harmonized job architecture framework, aiding in acquisition integration efforts and ensuring consistent enterprise-wide decision-making
- **US Private Bank:** Developed a multi-year transformation roadmap, reducing \$10M+ in annuity compensation spend and enhancing reward differentiation
- **Major US Lender:** Enhanced role-based assessment criteria using industry research and headcount analytics, expediting staffing for a new client-facing servicing function
- **US Regional Bank:** Reduced unprofitable delivery costs by modifying role profiles, implementing new incentives, and eliminating redundant reward opportunities
- **\$8B AUM Multi-Family Office:** Led a C-suite performance management transformation, optimizing scorecards to align with strategic objectives and improve award allocation decisions

Director, APAC Regional COO, Hong Kong, SAR, Jul 2011 – Jan 2013
Supported regional leaders and local consultants to drive revenue growth and implement best practices

- Spearheaded a strategy shift from transactional to advisory business, increasing consulting fees and impact of client deliverables
- Led regional recruitment for all client-facing roles from Analyst to Partner, managing third-party recruiter relationships

- Facilitated the first internal Global Executive Committee meeting in Asia with a focus on aligning global and regional business strategies
- Established and grew McLagan's APAC Wealth Management business, overseeing performance and reward products and solutions

Vice President, Head of Consumer Banking, Nov 2004 – July 2011

Built and expanded performance and compensation benchmarking business inclusive of annual compensation surveys and associated consulting. Supported UK and Middle East regional offices to launch and win business in retail financial services sector.

- Built US business from zero to an annuity business generating over \$1M annually
- Frequently selected for internal strategic committee leadership both locally and globally

ALLEGIS GLOBAL SOLUTIONS (fmr InSearch Worldwide) Stamford, CT Jun 1999 – Oct 2004**Client Relationship Manager**

Led on-site RPO retained search teams to streamline staffing, elevate relationships, advise on sourcing strategy, manage candidate pipelines, and oversee internal and external talent acquisition

EDUCATION**Bachelor of Science, Business and Retail Management**

University of South Carolina, Columbia, SC