Colleen A. McGuire

Concord, MA

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Consultant – Organizational Effectiveness

Particular focus on Mergers & Acquisition, Turnaround Businesses and Start-up Companies

- Assess, identify and resolve strategic, structural, and alignment problems for enhanced productivity and sustainable profitability improvement
- Gain clarity of vision, seek unity in mission and strategy, implement clear goals, accountability, metrics and rewards to drive organizations to breakthrough performance
- Improve communication, motivation and compensation practices to ignite sales and marketing efforts to deliver top-line superior results
- Increase customer satisfaction and employee morale with customer and talent-centered approaches and methods

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Professional Summary and Experience

*Senior Corporate Strategic Leader and Consultant *25+year Robust Financial Results *Financial Services Industry Expertise *Cross-Functional & Multi-Segment Experience *Growth, Turnaround and Integration Skills *Energetic and Persuasive Leadership Style *Top-tier Training

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Senior Corporate Roles

WACHOVIA BANK, N.A., Hartford CT

New England - Managing Director/Regional Director and Senior Vice President *(Acquisition & Growth)*

Charged to lead and manage integration and growth of Registered Investment Advisory boutique in Boston purchased by Wachovia in late 2004. Additionally, charged to turnaround and grow multi-functional existing Hartford Wealth Management operation; $20 million combined revenue businesses

Boston

- Increased revenue from $1.8 million to $5.5 million, Assets under advisement from $250 million to $750 million and Doubled clientele with no increased expense
- Developed and Drove growth strategy and marketing plan, Built and Spearheaded training and development for existing staff
- Restructured Human Capital for process improvement, increased employee satisfaction and client profitability

Hartford

- Turnaround compliance project: Process overhaul - advance from failed internal audit (just prior to arrival) to successful audit
- Strategic Business Line Analysis: Recommendation – Unit transferred from Wealth Segment to Private Banking Segment

MELLON FINANCIAL CORPORATION, Boston MA

Managing Director and Senior Vice President *(Turnaround & Growth)*

Charged to grow revenue in 4 national business lines, in different business life-cycle stages, with stagnated growth: Family Office, Endowments & Foundations, Charitable Planned Giving, and Wholesale Trust - $60 million combined revenue businesses; $20 billion in assets

- Increased New Business Revenues - 3 year 45% CAGR, Led 9th (bottom) ranked sales unit to 1st ranked with lowest relative cost of sales
- Developed National Sales and Marketing strategy – highlights - National Expansion, Realigned institutional sales infrastructure and distribution force, Repositioned the brand - Drove collaborative sales and service coordination and Overhauled RFP operation
- Improved Practice Development – highlights - Drove strategic analysis for all four business lines - rigorous analysis of service concepts, target markets, service strategy, and service delivery - Developed new business model and implementation plan - Spearheaded policy and procedure development - Established benchmarking and best practice analysis, client satisfaction research, and win/loss business analysis
- Leadership Initiatives - Influential member of senior executive council designed by Vice Chair and President for thought-leaders to advance strategic mission, focus and empower organization - Most senior-ranked Boston female with line responsibilities was founding member and driver of the Boston's Women's Initiative and active mentor for developing executives

Consulting Roles

For-Profit and Non-For Profit; Retained, Project & Pro Bono, Boston MA & Hartford CT

- Care Team Solutions (Start – up) - Organizational Effectiveness/Strategic Advisor to Founding Members
- Generations Cinemastories (Growth) - Organizational Effectiveness/Strategic Advisor to Owner and Senior Executives
- Harvard Business School's Community Partners of CT (Non-Profit) - Strategic Consulting to Executives
- Community Wealth Ventures - Greater Hartford Community Wealth Collaborative (Non- profit) – Strategic Mentor for Presidents and CEOs
- Financial Services Boutiques (Growth & Turnaround) -strategic, marketing, and organizational consultant to founders and senior management
- Deloitte & Touche Consulting Group – Braxton Associates (Growth & Turnaround) - Strategy: Conducted thorough analysis aimed to increase share of market for client; Change Leadership: Participated in corporate-wide reorganization design impacting 4,000 positions
- Mellon Bank Corp (Start-up Service) Advised senior management at Mellon Private Asset Management division regarding corporate-wide launch of multi-million dollar *Dreyfus Masterpiece* service
- Strategic Capital Resources (Start-up) - Analyzed business plans presented by closely held, early stage companies in various industries seeking capital. Provided strategic planning advice to business owners and performed competitive market studies
- Select Private Clients: Performed investment management consulting including portfolio review services, asset allocation and policy statement development, as well as performance evaluations

Direct Line Experience

SHAWMUT INVESTMENT ADVISORS, FLEET BANK/ BANK OF NEW ENGLAND N.A., Boston MA;
CT NATIONAL BANK, MERRILL LYNCH, PIERCE, FENNER AND SMITH INC., New Haven CT, Hartford CT
Vice President Investment Management Sales, Equity Research Analyst, Financial Consultant

- Achieved superior results as high net worth sales contributor - Coordinated department strategic plan, conducted industry competitive analysis - Motivated and led team customer focus initiative - Participated in senior forum corporate level diversity effort - Analyzed fundamentals of Aerospace/Defense and Telecommunications industries and underlying companies. Contributed to the ongoing modulation of quantitative models and equity fund management - Developed high net worth and ERISA investment management, fiduciary, and banking relationships - Developed and directed sales training program and steered creation of collateral materials
- NASD Series 7, 63

Education

The Association to Advance Collegiate Schools of Business, USC Marshall School of Business, UCIrvine The Paul Merage School Of Business

- Professionally Qualified Bridge Program – Certified to meet AACSB accreditation standards for academia

The Institute of Chartered Financial Analysts, Charlottesville VA

- Awarded designation of Chartered Financial Analyst

Harvard University Graduate School of Business Administration, Boston MA

- Awarded Master in Business Administration degree. General management, strategy, and leadership interests pursued. Outreach volunteer

Central Connecticut State College, New Britain CT

- Awarded Bachelor of Science, Magna Cum Laude, in Marketing, finance and communications concentration. President of Alpha Beta Sigma Business Honor Society. Completed a comprehensive internship at Aetna Life and Casualty

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Non-Profit, Board Affiliations, and Industry Associations

The Commonwealth Institute, Boston MA
*Corporate Advisory Member
United Way of Massachusetts, Boston MA
*Vice Chair of *Today's Girls Tomorrow's Leaders* Campaign and corporate steering committee leader
Jane Doe Inc. The MA Coalition against Domestic Violence and Sexual Assault, Boston MA
*Board Director
The Institute For Women's Leadership, Redwood City CA
*Active member and ongoing participant in *Executives Leading Sustainable Change*
Chip In For A Cure, Hartford CT
*Committee member to raise funds for breast cancer programs in Greater Hartford