

Capabilities brief

DAVID MAUDE

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DAVID MAUDE – KEY CREDENTIALS

Who I am

- **Independent consultant**, specialising in wealth management
- 20 years of **financial services experience**, including
 - Consultant, **McKinsey & Company**
 - Strategy Manager, **Barclays**
 - Senior Economist, **Bank of England**
- Successfully completed **range of consulting engagements around the world**
- **Publications** include two books on private banking
 - *Global Private Banking and Wealth Management: The New Realities*, (Wiley, 2006)
 - *Private Banking: Maximising Performance in a Competitive Market*, (Euromoney, 1996)
- MPhil in Finance, **Cambridge University**
- British, now living in Verona, Italy

How I work

- **Key areas of expertise**
 - Strategy design and implementation
 - Business performance enhancement
 - Corporate development
- Accustomed to working in various ways, for example
 - **Independently**, reporting directly to senior management
 - As **project manager**, coordinating work of internal and external teams (consultants, investment bankers, other specialists)
 - In **advisory** and/or **execution** capacities
- Highly **flexible**: in principle, able to work
 - Full or part time
 - On a sporadic or ongoing basis
 - At client site, from home office, or from elsewhere
- **Hands-on approach**: pragmatic and impact oriented
- **Global perspective**

THREE SPECIFIC WAYS IN WHICH I ADD VALUE

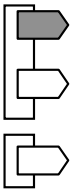
NOT EXHAUSTIVE

Role*	Elements of value added
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Advice</p> <div style="border: 1px solid black; padding: 5px; margin-bottom: 10px;"> <p>Strategic Thought Partner</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>Trusted Adviser</p> </div>	<ul style="list-style-type: none"> • Generate independent ideas and insights, leveraging industry knowledge • Develop coherent business strategy • Share case studies of successful approaches • Design and lead productive workshops • Drive structured problem solving • Undertake analysis, benchmarking and fact gathering • Act as experienced 'sounding board' and 'early-warning indicator' <ul style="list-style-type: none"> – Reacting to ideas of others – Assessing associated pros and cons – Providing cross-check on feasibility – Highlighting potential pitfalls and 'blind alleys' – Course correcting as necessary • Constructively refine ideas in light of business judgement and experience • Develop business case • Support communication to Board/ senior management
<p style="writing-mode: vertical-rl; transform: rotate(180deg);">Implementation</p> <div style="border: 1px solid black; padding: 5px;"> <p>'Hands-on' Business Builder</p> </div>	<ul style="list-style-type: none"> • Undertake/ manage market-research effort (interviews, focus groups, intelligence gathering, etc) • Put together comprehensive, well-prioritised action plan • Identify and screen relevant third parties and business partners • Conduct due diligence • Assist with resourcing • Interim management

Specialist resource, working with you as a complement to internal and external teams

* Not mutually exclusive. Emphasis on given role will naturally tend to shift during the course of given project

STRATEGIC THOUGHT PARTNER



Elements of value added

- Generate independent ideas and insights, leveraging industry knowledge
- Develop coherent business strategy
- Share case studies of successful approaches
- Design and lead productive workshops
- Structured problem solving
- Undertake analysis, benchmarking and fact gathering

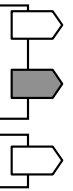
Supporting evidence

Wealth management **expertise**

- 15 years **experience** in wealth management
- Wide range of wealth-management-related consulting engagements
- Two best-selling books
- Global perspective on the industry
- Well **networked** into wealth management community
- Access to all relevant **industry research** (online databases, reports, etc)

Intrinsic skills

- Well-structured, **'bullet-proof' problem-solver**; clear, pragmatic, fact-based thinker
- Seasoned workshop leader; **strong communicator**



TRUSTED ADVISER

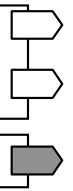
Elements of value added

- Act as experienced ‘sounding board’ and ‘early-warning indicator’
 - Reacting to ideas of others
 - Assessing associated pros and cons
 - Providing cross-check on feasibility
 - Highlight potential pitfalls and ‘blind alleys’
 - Course correcting as necessary
- Constructively refine ideas in light of business judgement and experience
- Develop business case
- Support communication with Board/ senior management

Supporting evidence

- **Experienced consultant** – and consultant user:
I understand how big consultancies work; their strengths and weaknesses; and which buttons to press when and how hard
- At Barclays, role included reviewing strategic investment requests – applying a **private-equity-type approach**, reality checking and stress testing
- At **McKinsey**, role included advising teams on wealth management issues (‘consultant to the consultants’)
- Strong **knowledge of what does and does not work** in the wealth management industry
- Seasoned **business coach** and mentor – particularly enjoy helping develop client executives
- Recent engagement working alongside a large consultancy, reporting directly to the relevant business unit CEO

'HANDS-ON' BUSINESS BUILDER



Elements of value added

- Undertake/ manage market research effort (interviews, focus groups, intelligence gathering, etc)
- Put together comprehensive, well-prioritised action plan
- Identify and screen relevant third parties and business partners
- Conduct due diligence
- Assist with resourcing
- Interim management

Supporting evidence

- Experienced **project manager**
- Experience at McKinsey and Barclays included writing and appraising **business plans/** cases, and incubating new businesses
- Experienced in helping with **cross-border expansion**, e.g., Barclays (Middle East, South Africa, Italy), French investment bank (UK)
- At Barclays, orchestrated **due-diligence** effort for a major cross-border acquisition
- Access to **strong networks**, e.g., McKinsey alumni, business schools, wealth management community
- Thoroughly enjoy rolling up my sleeves and getting stuck into all aspects of new business **implementation**