

FUNCTIONAL JOB TITLE: Regional Director, Delaware

DESCRIPTION: As a Regional Director, you will be responsible for managing the Private Wealth business and client experience and advancing the Wilmington-based regional office's growth strategy. You will serve as a key executive to The Glenmede Trust Company of Delaware (GTCDE). Key elements of these responsibilities include senior leadership of the regional Private Wealth team and market; overseeing the delivery of fully integrated Goals-Based Wealth Management to clients who have \$5 million to \$150+ million of investable assets; enhancing service areas to ensure sustainable, competitive positioning; directly managing a select number of client relationships, and actively representing Glenmede in the industry and community at large.

RESPONSIBILITIES:

Lead Business Management, Development and Growth: Effectively lead and coach the Delaware-based Private Wealth group, a team of high performing professionals, to achieve annual and long-term business goals and individual career satisfaction at Glenmede. Lead the team in providing fully integrated Goals-Based Wealth Management advice and services, client development, and community engagement in a manner consistent with Glenmede's values, strategy, and business practices. Lead the team in developing referrals and cultivating new business opportunities from your collective personal network, the existing client base, and intermediaries and influencers. Serve as a visible member of the community, and provide advocacy and support for business development and client appreciation events.

The Glenmede Trust Company of Delaware (GTCDE): Serve as President and member of the Board of Directors of The Glenmede Trust Company of Delaware, established in 2020 to further augment Glenmede's fiduciary solutions for domestic and international clients interested in the unique aspects of Delaware Trusts. This position holds primary responsibility for growth, build-out, and practice management of GTCDE by collaborating with Fiduciary Practices, Fiduciary Counsel, the Executive Directors of Private Wealth and Business Development, other Regional Offices, and business areas central to its long-term success. This position will work directly with clients, prospects, and professional advisors to deliver GTCDE solutions, excellent service, client satisfaction, and overall business growth.

Relationship Management: Manage key client relationships by drawing upon your skills and those of your colleagues and outside advisors to deliver a personalized Goals-Based Wealth Management experience. Provide advice and solutions that integrate investment management disciplines; estate, financial, and tax planning services; trust and estate management and administration; and legacy, educational and philanthropic services. Develop excellent relationships with all GTC colleagues and client advisors.

Firm Building: Serve as a member of the Private Wealth Leadership team, the Private Wealth Operating Committee, and other key committees and initiatives to advance the overall business and practice areas. Be a strong partner with Marketing, Sales, Operations, Technology, Middle Office, and other business areas to ensure quality practices and process management. As a senior leader in Private Wealth, advance relationship management, service strategy, and resource development by contributing to and leveraging best practices; engaging specialist professionals to enhance the client experience and related services continually, and cultivating and collaborating with other industry practitioners. Perform other duties as required by the position.

REQUIRED QUALIFICATIONS:

- Bachelor's degree.
- 5+ years of experience managing and leading a high-performing team of wealth management professionals.
- 10+ years of experience managing high net worth client relationships in wealth management, fiduciary or family office environment.

PREFERRED QUALIFICATIONS:

- Advanced degree or professional certifications (CFA, CPA, CTFA, or CFP).
- Solid knowledge of investment management, trust management, financial planning, fiduciary law, and related federal and state regulations, with a preference for depth in one of those areas.

- Sound knowledge of legacy, philanthropic, educational and related areas.
- Excellent business acumen with family CEO-level presence.
- Highly developed communication skills, both oral and written, for effective technical and interpersonal interaction with clients, intermediaries and colleagues (excellent partnership skills).

Glenmede is an Equal Opportunity Employer and Prohibits Discrimination and Harassment of Any Kind: Glenmede is committed to the principle of equal employment opportunity for all employees and to providing employees with a work environment free of discrimination and harassment. All employment decisions at Glenmede are based on business needs, job requirements and individual qualifications, without regard to race, color, religious creed or belief, national origin, ethnicity, ancestry, age, physical or mental disability, HIV Status, sex including pregnancy, childbirth, breastfeeding or medical conditions related to breastfeeding, and medical conditions related to pregnancy or childbirth, gender, sexual orientation, gender identity and/or expression, marital, civil union or domestic partnership status, past or present military service, family medical history (including pregnancy), genetic information or characteristic, family or parental status, or any other status protected by the laws or regulations in the locations where we operate. Glenmede will not tolerate discrimination or harassment based on any of these characteristics.

**No agencies, third parties, or phone calls, please. We are not partnering with an external search firm for this role. Glenmede is not accepting unsolicited resumes from search firms. All resumes submitted by search firms to any employee at Glenmede via-email, the Internet, or directly without a valid written search agreement will be deemed the sole property of Glenmede, and no fee will be paid in the event the candidate is hired by Glenmede.