

# Excelsior Search

[www.excelsiorsearch.com](http://www.excelsiorsearch.com)

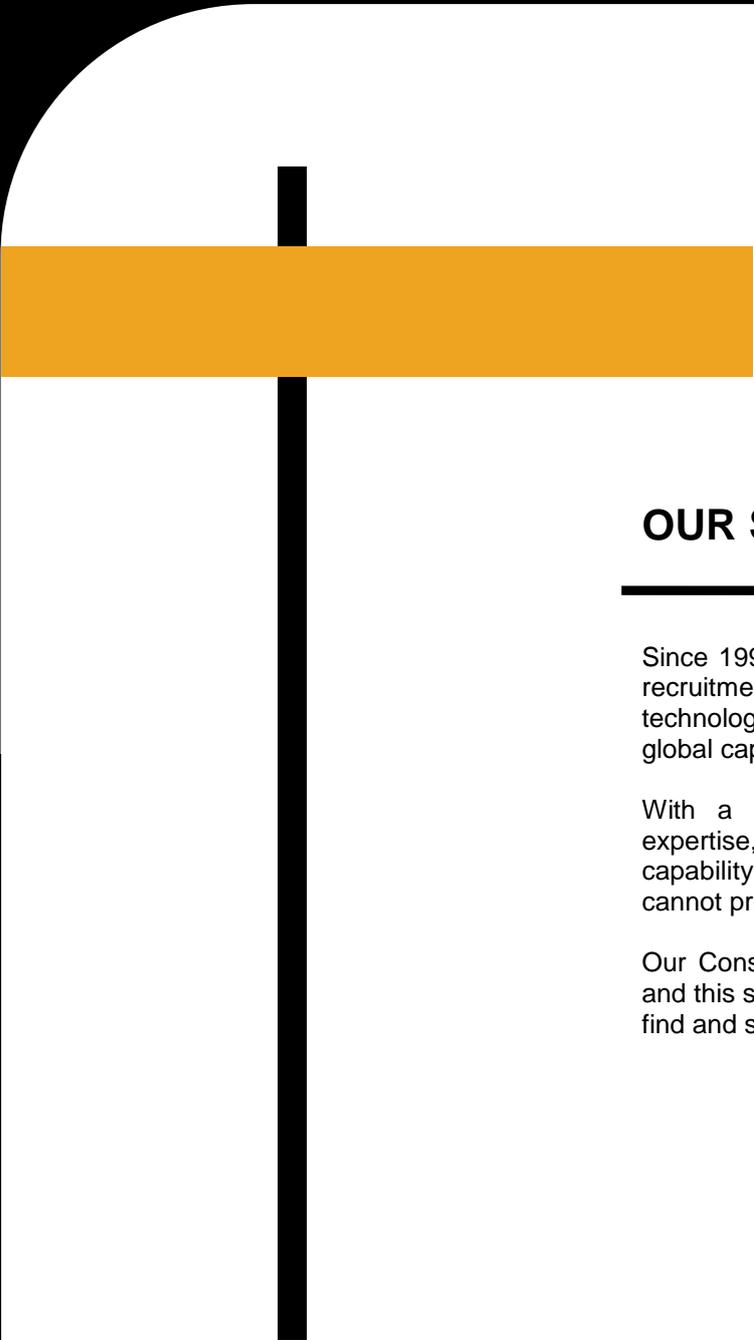
Specialists in International Recruitment & Executive Search  
for Capital Markets & Investment Technology, Data & Research Providers



*“Excelsior’s help in finding high quality people to add to the team has been critical!”*

CEO,  
Forbes FinTech 50 firm

Integrity | Confidentiality | Accuracy | Quality



## OUR SPECIALITY

---

Since 1999, Excelsior Search has been a trusted global recruitment & executive search partner for financial technology (FinTech), data and research providers to the global capital markets and investment industry.

With a very clear market focus and deep sector expertise, Excelsior as a talent acquisition partner has a capability the more generalist recruitment companies cannot provide.

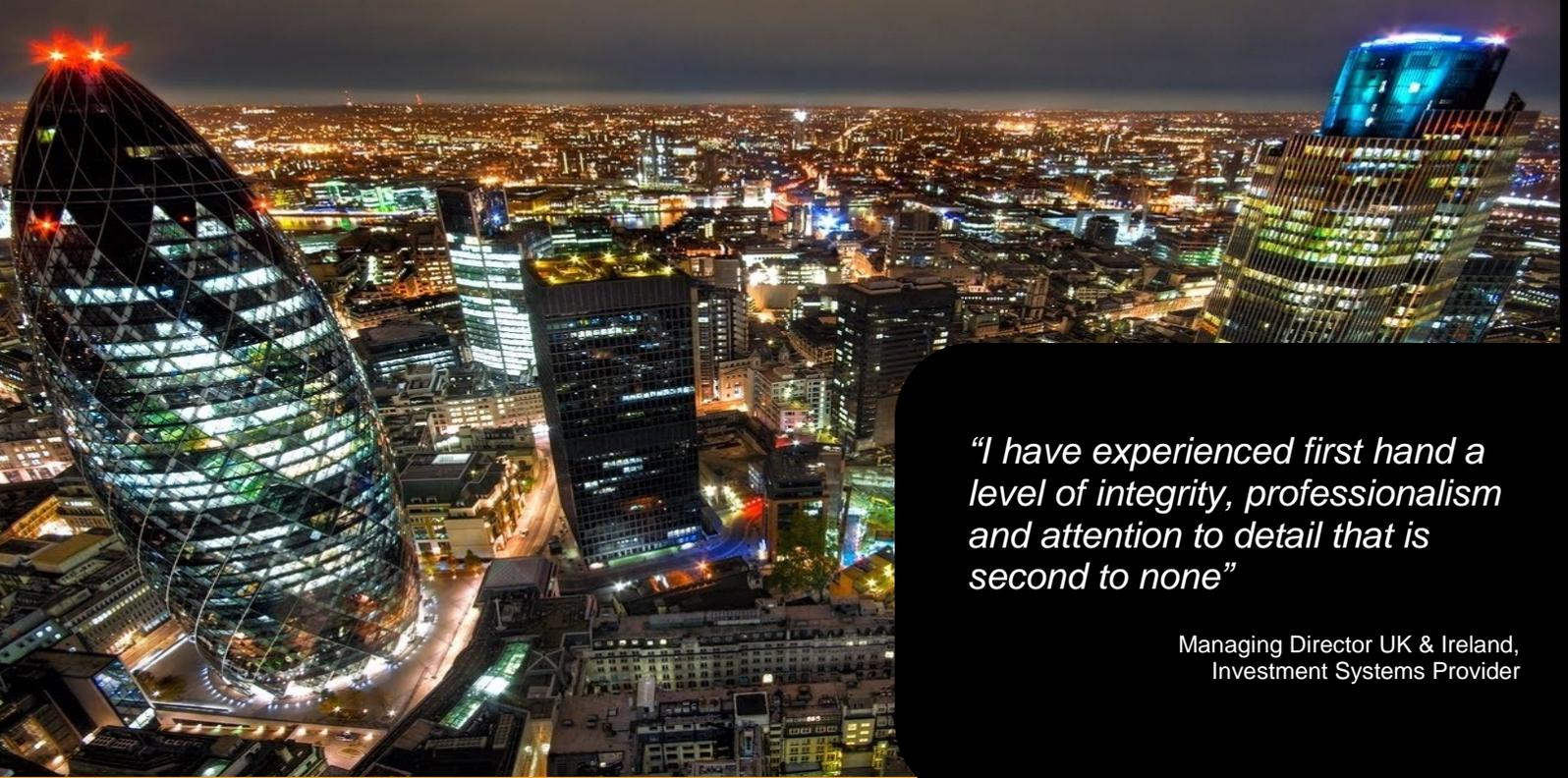
Our Consultants are recognised as knowledge workers and this specialist ability gives us the competitive edge to find and secure the finest industry talent for our clients.

*“Without a doubt Excelsior has given us a service head and shoulders above any other search company. They have certainly shown a detailed understanding of our market sector, as well as our recruitment needs on a Global scale”*

CEO,  
Risk Management Software Vendor



*FinTech, WealthTech, InvesTech, RegTech, investment research, artificial intelligence, big data, natural language processing, trading, OMS, EMS, trade surveillance, market data, portfolio management, portfolio analytics, market risk, credit risk, derivative pricing, performance attribution, compliance, regulatory reporting, MiFID II, fund accounting, fund administration, client reporting, collateral management, cash management, settlement, payments, post trade securities processing, blockchain, corporate actions, data management ...*



*“I have experienced first hand a level of integrity, professionalism and attention to detail that is second to none”*

Managing Director UK & Ireland,  
Investment Systems Provider

## COMPANIES WE PARTNER WITH

---

The companies that benefit from using our services are solution providers to Investment Banks, Wealth and Asset Managers, Hedge Funds, Private Equity Funds, Sell-side Brokers and Exchanges. These solution providers we partner with typically fall into one of four main groups:

- **Technology Companies** - Financial technology (FinTech) solutions and services.
- **Financial Information and Research** - Provision of investment research, news and data.
- **Management Consultancies** - Business or technology led consultancies.
- **Financial Institutions** - Institutions providing technology, data or research led solutions.

## ROLES WE RECRUIT FOR

---

The competitive nature of the sector means that demand exceeds supply across most company functions and at all levels for the highest performing individuals. Therefore Excelsior offers a ‘total solution’, using search to pro-actively seek out the best talent across all company functions areas, all levels of employee from C level down, and all geographies.

Profiles include: CEO, COO, General Management, Business Development, Sales, Marketing, Pre Sales, Customer Success, Software Engineering, Product Management, Implementation, Client Services and Consultancy.

## INTERNATIONAL REACH

---

Given the global nature of the finance industry, we have a proven international search capability to meet the local needs of our clients servicing the main financial centres across the Americas, Europe, Middle East & Africa, and the Asia Pacific.

## SEARCH PROCESS

---

Excelsior is known for being process orientated, exacting a thorough discipline and exercising complete due diligence. Working as a trusted advisor in collaboration with our clients through a well defined 6 stage search process ensures we secure the best industry talent.



Specialising in one industry sector means our Search Consultants are powerfully effective in their ability to target, connect and develop credible relationships with the most appropriate industry professionals.

Each client is allocated a dedicated consultant experienced in their area of business to execute search assignments from beginning to end; from initial definition meetings, to conducting research, head hunting calls, candidate qualification and management of the interview and offering stages.



## WHY EXCELSIOR

---

We pride ourselves on a combination of rigorous search and selection processes with a high level of customer service, but the differentiating power of our search ability is underlined by a sector focus on solution providers for the global capital markets and investment industry.

### **Unique sector understanding**

We know the strategic, financial, cultural and operational challenges faced by companies in our market area, and how they impact on the precise skill set and experience required.

### **Track record & results orientated**

We have proven our value as a trusted search partner that delivers on its promises to many market leading companies.

### **Access to the right talent**

Our extensive and carefully nurtured global network provides an unparalleled “hidden pool of talent” to tap into. We have the credibility and ability to identify and approach the most appropriate industry professionals.

### **Ambassadors for our clients**

Our industry reputation, sector knowledge and professional style ensures we present our clients’ opportunity with credibility, generate interest and create the right conditions to close the best candidate.

### **Time to complete**

Our pro-active nature and market expertise means we’re able to conduct assignments in a very time effective manner, and meet the most demanding timescales.

### **Total solution partnership**

We save our Clients valuable management time using a trusted search partner that really understands their business needs, and delivers results across their organisation.

### **Emotional commitment**

Each of our team takes great pride in the quality of their work and contribution to the successful completion of assignments. We are proud of the strong brand and niche industry reputation we have built.

## CASE STUDIES

---

### North American organisation setting up a European operation & subsequent global growth

An assignment brief was taken from The Global Head of Sales for a US owned provider of equity research information and analytics, looking to set up a European operation. A search was successfully undertaken to find their first senior sales professional in London, who assessed and further developed their proposition for the European market and led their revenue growth with Investment Banking clients.

In the 6 years that have followed this initial success, Excelsior and the client have enjoyed a mutually beneficial business partnership, and further international key hires include:

- European Buy Side Sales Director (London)
- Head of Account Management (London)
- Consultants and Sales Executives (London and Paris)
- Sales Specialist (Hong Kong)
- Sales Manager (Chicago)

### Silicon Valley Machine Learning & Big Data FinTech

For a US FinTech start-up targeting the hedge funds and institutional investment firms, Excelsior was introduced by the CEO of another company we had previously partnered with very successfully. Our involvement at this new FinTech started with a concerted effort to help build out their North American sales team which we successfully did, and 5 years later have continued to add to with sales and account managers in New York, Boston, Chicago and London. With a great awarding winning product and recognition in the Forbes FinTech 50 list, this FinTech company has grown through the commercial success of its sales team we helped build. The company has also continued to raise additional rounds of investment, and strengthened other functions with new hires in partnership with Excelsior, adding staff across the company in Marketing, Research Content Acquisition, Product Management, Product Marketing and Client Services.

*“Your help in finding high quality people to add to the team has been critical.” CEO*



*“The professionalism with which Excelsior represented our company and the calibre of the candidates that we were introduced to was most impressive”*

General Manager International Operations,  
IT Services Company



## CASE STUDIES

---

### High growth British start up

Having been placed by Excelsior previously in a Sales & Marketing Director role, the Chairman of this company recommended they engage the search services of Excelsior for the hire of key personnel to take their credit derivative software to market and grow the business. Working as their search partner, Excelsior helped the company grow from 12 to 45 staff, with the placement of a number of Senior Executives, Middle Managers and Specialist Consultants including:

- The company's first Sales Executive, and subsequent additions to this team
- Head of Software Development
- Global Head of Sales
- US Head of Sales & Operations based in New York to lead the company's expansion into North America
- Implementation and Pre Sales Consultants

### VC backed expansion

Excelsior was approached by a global Private Equity and Venture Capital Investment Company as part of an exercise to select an Executive Search company to conduct a search assignment for one of their clients. Following a rigorous selection procedure whereby Excelsior's capabilities were assessed against some of the more generalist "blue chip" search firms, we were delighted to be appointed to conduct the search for a Global Head of Professional Services for this provider of portfolio management and fund accounting software solutions to the investment fund industry.

Building upon the success of this initial executive appointment and the incumbents subsequent appointment to a Regional Managing Director position, Excelsior have conducted searches for a UK Business Development Manager, Benelux Product Manager, and Implementation Project Manager for Hong Kong. Having demonstrated the high quality and results of our search services, good foundations have been laid from which the client will continue to benefit from engaging our search services.

Integrity | Confidentiality | Accuracy | Quality



North America  
+1 646 475 2215  
northamerica@excelsiorsearch.com



United Kingdom (HQ)  
+44 207 495 3088  
europe@excelsiorsearch.com



Continental Europe  
+41 425 081 055  
europe@excelsiorsearch.com



Middle East  
+973 1619 9435  
middleeast@excelsiorsearch.com



Asia Pacific  
+852 3008 5695  
apac@excelsiorsearch.com



South America  
+55 11 3230 1130  
southamerica@excelsiorsearch.com

[www.excelsiorsearch.com](http://www.excelsiorsearch.com)