



d. hilton associates inc.

Trusted Strategic Partner  
to the Financial Services  
Industry Since 1985

# About Our Firm

D. Hilton Associates Inc. (D. Hilton) consults with financial institutions of all sizes across the country, focusing on the full executive lifecycle from recruitment to succession.

We have unmatched experience in developing customized solutions for executive recruiting, compensation plans, strategy development, board leadership, retention and retirement strategies, and SERP / Split Dollar design and implementation.

D. Hilton provides a wealth of support services and proprietary data focused exclusively on the financial services industry. D. Hilton's in-house team of human resource, organizational development, and research consultants develop long-term relationships with your organization, becoming independent, trusted advisors and providing fresh and tailored approaches to enhancing your organization's performance and meeting challenges.

David M. Hilton, Ph.D., founded D. Hilton Associates in 1985 after serving as a successful financial services executive in New York and New Jersey. The financial services industry embraced Hilton's unique perspective on Board/CEO dynamics as a predictor of long-term organizational success. He developed groundbreaking

recruiting strategies that focused on understanding and appreciating board governance and financial institutions' unique cultures as an integral part of the search process. The work proved immediately successful as Inc. Magazine recognized D. Hilton Associates as one of the 500 fastest-growing companies in the nation early in the firm's existence. D. Hilton has gone on to receive numerous awards of excellence, including being recognized by *Forbes* as one of **America's Top 100 Executive Recruiting Firms** for multiple years in a row.

That spirit of innovation and dedication examining challenges well below the surface has become the trademark of all of D. Hilton Associates' work.

Committed to using our strategic insights and instincts to expand the industry's technical knowledge, we devote a significant portion of our internal resources to primary research, new product development, and benchmarking best practices. Our practice leaders are thought leaders in their respective disciplines, and we define success on the quality of client service delivered, not on the quantity of services delivered.

# What Sets D. Hilton Apart

1

## **We Set the Industry Standard.**

Since 1985, D. Hilton Associates has been at the forefront of offering new initiatives and solutions to meet the evolving needs of financial institutions. We have set the industry standard through our practices built on extensive knowledge, research, and innovation.

2

## **We are Independent.**

You can trust D. Hilton to recommend tailored solutions to meet the unique needs of your business. We have no affiliations with other financial services providers, associations, or vendors, nor do we offer services directly to individual executives. Our business model ensures that our recommendations are unbiased and independent.

3

## **We Work Exclusively with Financial Institutions.**

Our dedication to financial services uniquely positions D. Hilton to partner with your organization in navigating the industry's ever-changing challenges. Our focus allows us to understand your business and provide solutions to best meet its needs. We devote our total energy to providing you with specialized expertise in each practice area.

4

## **We Offer a Large, Experienced In-house Staff.**

As one of the largest and most experienced companies of our kind, D. Hilton has a team of full-time, in-house professionals with outstanding credentials, including SPHR designations, securities licenses, diversity and inclusion certifications, master's degrees, and doctorates. Our executive team has over 110 years of combined experience in the financial services industry. We continue developing our staff and practices to ensure we have the knowledge to serve our clients best.

5

## **We are the Most Qualified Firm.**

D. Hilton offers a breadth and depth of analytical and operational services that cannot be found with other firms. Our blend of financial services experience and technical expertise allows us to offer a holistic approach when partnering with your financial institution.

# Executive Recruiting



Scan the QR code for more information about **Executive Recruiting** from D. Hilton Associates.

## Identifying Talented Leadership for Financial Institutions

D. Hilton Associates' Executive Recruiting Practice has a team of talent acquisition professionals with decades of experience. D. Hilton's executive search services feature a proven candidate assessment process, research to ensure a diverse slate of candidates, flat fee pricing, and our unconditional search guarantee. With thousands of successful executive placements, D. Hilton is the top partner for financial institutions looking for top talent.

### Our Executive Search Methodology

We understand the organizational impact of leadership changes and the importance of finding the right executive who matches your financial institution's needs and culture. The requirements and nuances of a leadership position exceed what can be defined in a job description or position advertisement.

D. Hilton's proprietary executive search methodology begins with a strategic meeting to better understand your financial institution's business model, needs, and unique culture. This knowledge allows D. Hilton to build a customized search strategy to identify and target top talent to meet your organization's needs.

Our thorough and rigorous candidate assessment evaluates multiple factors and traits beyond the required skillsets, allowing D. Hilton to select and present the most capable, qualified candidates to serve as leaders in financial institutions across the nation.

### President and CEO Executive Search

D. Hilton's extensive experience working with Boards of Directors within financial institutions gives our Executive Recruiting Practice an unparalleled understanding of the dynamics between the Board and their sole employee: the Chief Executive Officer.

We have the knowledge to identify the skills and expertise your financial institution seeks in its next CEO, as well as those intangible traits and soft skills that ensure a successful placement.

### C-Suite Executive Search

Financial institutions contend with the challenge of hiring talented executives in an increasingly competitive market. D. Hilton's executive recruitment professionals assist financial institutions in overcoming hiring challenges to ensure attracting the best talent possible for their executive team.

### Succession Planning

D. Hilton offers executive management succession planning and executive assessments to prepare financial institutions for a positive transition in advance of a change in leadership.

# Compensation Services



Scan the QR code for more information about **Compensation Services** from D. Hilton Associates.

## Guiding Financial Institutions in Retaining Top Talent

With the time, training, resources, and trust your organization invests in its staff and executives, retaining top performers and leadership is critical. Ensuring your best and brightest feel fairly compensated, recognized, and rewarded for their work can inspire loyalty and nurture a positive, productive culture. Defining an organizational compensation philosophy can assist in ensuring internal equity and appropriate pay at the executive, management, and staff levels. D. Hilton has extensive experience working with financial institutions to design highly effective compensation programs that help attract and retain top talent.

### Executive Compensation Plan Design

D. Hilton Associates' compensation practice develops and assists in implementing appropriate executive compensation plans for chief executives and senior managers. An effective executive compensation plan should align with the strategic goals and vision of the organization. D. Hilton provides market-competitive, total cash compensation recommendations for financial institutions of all asset sizes.

### Staff Salary Administration Program Reviews

D. Hilton Associates' Salary Administration Program Review helps your organization balance fair pay with responsible fiscal accountability. This multiphase project assesses the total rewards program for financial institutions' employees who are not at an executive level.

### Variable Pay & Sales Plan Design

An effective variable pay plan should use organizational metrics to incentivize and reward outstanding performance. Our team designs and assists financial institutions in implementing a self-funded, custom incentive plan for all levels of employees to increase sales, accomplish goals, support the organization's vision, and exceed your customer's expectations.

### Organizational Review & Performance Management

D. Hilton Associates has the expertise to work with your organization in conducting a series of evaluation tools to ensure your organization runs efficiently and thrives through transitions in leadership.

# Strategic Services



Scan the QR code for more information about **Strategic Services** from D. Hilton Associates.

## Bringing the Future of Financial Institutions into Focus

Financial institutions often struggle to create sound, actionable strategies for success because they lack the internal resources, expertise, or time to create an informed and targeted strategy. D. Hilton Associates provides you with access to the resources and expertise needed to develop and execute strategies for success, without taking time away from running your institution.

### Community, Customer, and Employee Research

For more than 35 years, D. Hilton Associates has measured customer satisfaction and loyalty with proven, proprietary methodologies that deliver actionable recommendations. Every assessment is customized for each institution's needs.

### Merger Facilitation

When financial institutions join forces, they can better compete and exceed customers' product and service expectations. As a neutral third party, D. Hilton can assist in negotiating even the most complex merger issues, streamline the process, and guide your institution through every step.

### Strategic Planning

Through our extensive experience in the financial services industry, D. Hilton Associates has found a consistent and imperative need for more developed planning processes, systems, and expertise. Our proven strategic planning model meets that need by providing an unbiased case for current and future product lines, delivery channels, and brand positioning based on sound business principles.

# Retention & Retirement



Scan the QR code for more information about **Retention & Retirement** from D. Hilton Associates.

## Strengthening the Bond Between the Financial Institution and the Executive

Your executives provide the strategic direction and leadership to help your organization achieve long-term objectives. Providing programs to retain those executives is critical for your financial institution's success, allowing it to build strategic momentum, cultivate a stable culture, and plan for future growth. D. Hilton Associates works exclusively with financial institutions to develop and implement retention programs to help retain your most valued executives.

### Supplemental Executive Retention and Retirement Plan (SERP) / Split Dollar Design and Implementation

Security in retirement is both an appealing enticement for senior executives and a powerful tool for financial institutions looking to retain, recruit, and reward top talent. Our retention and retirement practice can assist your organization in establishing non-qualified, deferred compensation agreements for select executives, in return for achieving agreed-upon goals and objectives.

### SERP / Split Dollar Research

The largest study of its kind in the financial services industry, the D. Hilton Associates SERP / Split Dollar Survey collects data on compensation and succession planning trends from a significant portion of the industry. By shining a light on the practices of peer financial institutions, our SERP / Split Dollar Survey can assist your organization in understanding the importance of retaining top talent through competitive compensation and retirement packages.

### Employee Benefits Prefunding

Benefits prefunding allows financial institutions to direct a portion of their excess liquidity into investments to cover certain benefit expenses. D. Hilton can develop a permissible prefunding investment strategy to support robust benefits packages for your organization's valuable employees.





## d. hilton associates inc.

**Choose the most trusted strategic partner in the financial services industry.**

D. Hilton Associates' vast experience and expertise will assist your organization in developing sound strategies for success, both now and in the future. Call today for more information on how D. Hilton Associates can partner with your organization at **(800) 367-0433** or visit us at **[www.dhilton.com](http://www.dhilton.com)**.

Founded in 1985, D. Hilton Associates, Inc. is one of the most recognized financial institution consulting firms in the country. D. Hilton has provided financial institution consulting services to over 5,000 institutions nationwide, with assets ranging from \$50 million to more than \$15 billion. Our major practice areas are Executive Recruiting, Compensation Services, Retention and Retirement, and Strategic Services.

800.367.0433 | [www.dhilton.com](http://www.dhilton.com)

9450 Grogan's Mill Rd, Suite 200, The Woodlands, TX 77380