

# About The Rankin Group

## **Strategic Guidance in Wealth Management:**

For over two decades, The Rankin Group, Ltd. has been a leading consulting and executive search firm, specializing in products and services designed exclusively for the wealth management industry. Our success comes from:

The unique perspective we've gained working with wealthy clients directly, and the advisors and financial institutions that provide services to them.

Our dedication to a single niche, and commitment to maintaining the highest level of service and ethical standards possible.

A clear vision for what we do very well and the types of clients who benefit best from our services.

## **The Qualities that Add Value to our Client Relationships**

Our impressive 25-year track record of working with financial services firms, wealthy families and private investors gives us an unmatched understanding of what works and doesn't work. Based on this experience, we intimately understand the needs and requirements of clients on either the buy or sell side of the desk.

Additionally, our family office consulting practice provides extensive counseling on the impact of family dynamics on the management of the family business or family office and their employees.

## **The Rankin Group, Ltd. Products and Services include:**

### **Executive Search**

The firm's flagship business consists of:

- Customized risk management approach to candidate selection.
- Design of recruiting tools to maximize return on investment in human capital.
- Behavioral profiling of candidates.

### **Family Consulting**

Our consultants guide clients through a needs assessment and consensus building process to:

- Review individual and common goals, and expectations.
- Examine establishment or redesign of a Family Office.
- Direct selection of alternative structures for managing their assets.
- Develop criteria for selection of family office staff or advisors.

### **Second Opinions**

When you need an objective evaluation of candidates that have been introduced to you through other sources, we will:

- Interview, profile and evaluate candidates.
- Perform reference checks.
- Assist in job offer negotiations.
- Make candid recommendations.

### **Transition Management**

Reorganizations and mergers call for careful redeployment of human capital to retain & position leaders to manage transition. Our firm provides:

- Evaluations of employee skills, personal style, attitudes and values.
- Team building sessions to strengthen working relationships.