



# **Conway & Greenwood Executive Search Consultants**

## **Proposal to DHIC**

### **Executive Search Services**

### **For DHIC's President & CEO**

**October 7, 2019**

October 4, 2019

Ms. Elizabeth Voltz  
Board Chair  
DHIC, Inc.  
113 South Wilmington St.  
Raleigh, North Carolina 27601

Via email to [beth@wvllp.com](mailto:beth@wvllp.com)

Dear Beth and Board Members,

Conway & Greenwood is pleased to be considered to partner with you in the selection of DHIC's new President & CEO. We know that when a great leader like Gregg Warren has led an organization for a long tenure and accomplished many great things, that it can seem like an insurmountable challenge for the organization, but we have good experience in finding just the right candidate to lead the organization into yet another great chapter ahead!

DHIC's affordable housing mission fits perfectly into Conway & Greenwood's national real estate and mortgage finance practice! It's really a perfect intersection of our experience and expertise. We are well known as one of the best executive search firms that serve the real estate finance industry with 23 years of experience and a fabulous track record with many of the nation's industry leaders. In addition, our generalist practice brings the same professionalism to regional, statewide and non-profit organizations as well.

Conway & Greenwood has exemplary experience working with boards and search committees and always delivers an excellent slate of candidates, managing an in-depth interview process, extends and negotiates the offer, and even ensures a good start through the initial year of employment. We work particularly hard to ensure a strong match with both the skills/experience required but also on the right cultural fit so that the new President will work well with the staff and the board. All services are performed with professionalism and attention to detail to ensure an excellent hire.

An additional factor that will benefit DHIC is the specific affordable housing and mortgage industry experience that Conway & Greenwood brings. I have a deep background in the industry (including residential, multifamily and commercial) and will leverage that specific knowledge to understand DHIC's nuances which allows for more substantive interviews and insight into the candidate's qualifications, abilities, and cultural fit.

The foundation of Conway & Greenwood's practice is to deliver a higher level of professionalism, performance, and integrity than any other search firms that serve the industry. Please also visit our website at [www.conwaygreenwood.com](http://www.conwaygreenwood.com).

Conway & Greenwood brings an excellent track record and wealth of experience in executive search and is well-networked nationally. We will represent DHIC particularly well to the prospective candidates and will ensure a great hire to lead the organization forward.

We are here in Raleigh and will work closely with both staff and board to ensure an excellent outcome. I am really looking forward to the possibility of working with you and DHIC's team.

Conway & Greenwood will do an excellent job for DHIC and for the many constituents that it serves! Many thanks for your consideration.

My best regards,

Paul B. Conway, Jr., CMB  
President & CEO

## 1. Statement of Qualifications:

Conway & Greenwood has an excellent track record with many of the nation's leading lenders and affordable housing participants in both the residential and commercial sectors.

Please see a more detailed list attached in Appendix A, but some notable examples include:



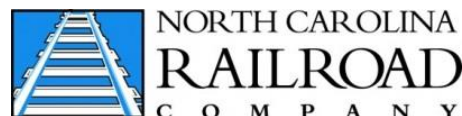


Conway & Greenwood also specializes in non-profits and regional, community focused and statewide organizations.

Some sample search assignments from entities such as:



DowntownRaleigh  
Alliance



Paul Conway's entire career has been focused on real estate/mortgage finance with more detail in affordable housing that can be listed, but some highlights include:

- Cameron-Brown's Loan Officer Training Program in aspects of FHA, VA, Fannie Mae, and Housing Finance Agency loans.
- Secondary Marketing Officer responsible for all HFA's (state and regional) from DC to TX at Cameron-Brown and Congressional Mortgage
- Individual approval as a Fannie Mae Delegated Underwriter
- SVP, Head of Lending for Southeastern Savings Bank (in Charlotte) with responsibility for the bank's affordable housing goals.
- Employment with three Mortgage Insurance companies in (Verex, PMI, GE Capital/Genworth) and joint creation of national low down-payment and affordable housing programs.
- GE Capital's relationship manager/lead negotiator with Fannie Mae on its affordable housing initiatives, pricing, and guidelines.
- The CMB Designation; the highest designation given by the Mortgage Banker's Association of America which requires complete knowledge and experience in both residential and commercial.

**Specific experience around replacing a founding or longtime executive director** brings to mind several examples but also highlights the way we conduct all of our assignments. The result is a very successful approach to replacing a longtime leader.

Conway & Greenwood always starts with detailed client interviews to really get to know the client and its culture. When that culture has been formed and led by one individual for a long period of time, I often find that my role almost borders on counselor and strategic consultant to assure each of the key executives (and sometimes even the board members too) that I interview, that it will be okay and that the next chapter of the organization will be bright and successful. It's important to be a positive and optimistic person that will portray the board's goals and remind the team members of the many great core competencies that will continue to propel the organization to future successes.

One of Conway & Greenwood's attributes is our ability to "tell the story" of our client in an attractive and compelling way that generates enthusiasm and excitement about what the next chapter of the organization holds. We delve deep into the strategic plan and initiatives to ensure we can convey them appropriately. Therefore, once those building blocks are understood, the task of replacing a longtime, loved leader is not so much about the loss of that leader but more about building on those successes and taking it to the next level. That is part of our approach to attracting great candidates and generating excitement about the organization and the opportunity.

Some examples of assignments replacing a longtime executive include:

- President & CEO, First Bank, Troy NC
- Executive Director, Disability Rights, Raleigh, NC
- Executive Director, North Carolina Housing Finance Agency, Raleigh, NC
- President & CEO, ZV Pate (family owned conglomerate), Laurinburg, NC
- VP Real Estate, NCRR, Raleigh, NC
- Treasurer, The Morehead-Cain Foundation, Chapel Hill, NC
- Founding Rector, Holy Trinity Anglican Church, Raleigh, NC

## **2. Recommended Scope of Services:**

### **A. Outlines Conway & Greenwood's generally recommended processes, tasks, responsibilities, and benchmarks for a national search:**

Please find our proven process outlined below, but it's important to note that we take a flexible approach. We will counsel the chair and committee on best practices and still conform to our client's preferences.

#### Defining the Scope of the Position

- Interview the client
- Confirm process and responsibilities
- Prepare/distribute Position Description

#### Identifying the Candidates

- Review proprietary database and contact potential candidates and key industry sources
- Identify range of candidates
- Begin initial interviews
- Prepare background summaries
- Submit initial slate of candidates to hiring manager

#### Building Momentum and Narrowing Candidate Base

- Obtain feedback from client
- Narrow candidate profile
- Identify additional candidates as applicable

#### Interviewing Candidates

- Facilitate the client interviews of candidates, participating as needed
- Receive feedback from client on each candidate
- Offer feedback to client from candidate
- Coordinate follow-up interviews with top candidate(s)
- Conduct reference checks as appropriate

#### Presenting the Offer

- Discuss potential offers with client prior to formatting
- Review Draft offer from client
- Present firm offer to candidate
- Negotiate offer/counteroffer process

#### Post Placement Follow Up

- Once offer is accepted, assist with resignation process and prepare candidate for counter offers
- Assist candidate and client with transition issues
- Once new executive on board, maintain contact with client and executive

Our proven approach to identifying and reaching candidates is based on both **networking and research**. We overlay a process of **broadcasting and targeting** potential referral sources and candidates. Once we create the position description, we leverage our proprietary client database to “announce” the search as we start the public phase of the assignment.

We are always highly professional and transparent and find our approach generates a positive response from even passive candidates that may not have been considering a move at all. Our strategic and informative presentation of the opportunity often moves those candidates to declare their interest in further exploring the opportunity.

Please see sample positions descriptions in Appendix B attached.

## **B. The ideal level of input and involvement from:**

**DHIC staff:** We like to conduct 360 degree interviews initially and we find that the staff likes to know they had input into the search process. We typically ask the search committee chair to identify which staff members might offer the best insight into the organization and its culture and we conduct short, individual interviews with each.

**Current CEO:** Is a key interview and would appreciate a longer interview with Gregg and perhaps lunch with him and the search chair.

**Search Committee Chair:** The search committee chair is the point person for the client and responsible for directing Conway & Greenwood throughout the search. We work hand-in hand with the chair, and support the chair in all of their responsibilities, and even coach them through best practices as needed.

**The Search Committee Members:** Need to be available for the various meetings throughout the process which are typically as follows:

- Initial group interview by C&G to outline the search, the organization generally, the strategic goals of the organization, and right attributes of the next CEO, the possible tracks/experience of the candidates, etc.
- Receive the slate of candidates by email and review prior to meeting or call.
- Meeting or call to review the slate and determine which candidates should be interviewed.
- Initial interviews of candidates and narrow to finalists.
- Second interview of candidates/finalists and make recommendation to board for approval of first and second choices as applicable.

Please see a draft schedule for DHIC's ED search on the next page.

**Board Members:** The board members that are not on the search committee need to be prepared to review and approve the committee's recommendation when it is submitted. It is important that this board approval not become a reworking of the work that the search committee has already done. If there are board members that would like input into the process and/or to interview the candidates, it is important that they be members of the search committee from the start.

**External Stakeholders:** External stakeholders are sometimes identified by the search committee as those that would either be good for C&G to interview in the initial assessment phase or often suggested as good referral sources with insight into the community of candidates once the search has entered the public phase.



### **C. The reasonable timeline for search activities and hiring:**

A search typically takes about four months from beginning to hire. With search committees, it's good to set dates prior to the start so everyone will hold the dates and the search will keep moving.

More detail:

The defining the scope/assessment phase takes about a week with an individual hiring manager and few stakeholders, and two to three weeks with search committees and more stakeholders. This is the time when we interview the committee, staff and stakeholders and then draft/re-draft the position description.

The public phase of the search from announcement to submission of the slate to the search committee is typically about a month for a specific corporate search and two months for a wider-ranging nonprofit search. We will also have the 2019 holiday season to manage and our experience finds that some candidates become hard to engage during the holidays but will re-engage on January 2<sup>nd</sup>.\*

The interviews usually take a search committee 30 days if they schedule them prior.

Extending and negotiating the offer typically takes a week or two, depending on if we land our first choice.

Here is a possible scenario for DHIC if led by Conway & Greenwood:

Friday, October 25:	DHIC search committee selects C&G ☺
Wednesday, October 30:	C&G interviews search committee
Monday, November 18:	C&G begins public phase of search *(search slowed a bit by the holidays)
Wednesday, January 22:	C&G submits candidate slate to search committee
Friday, January 24:	Call with Committee on which candidates to interview
Friday, January 29:	First round of interviews
Friday, February 14:	Second round of interviews, select 1 <sup>st</sup> and 2 <sup>nd</sup> choice
Friday, February 21:	Extend offer
Monday, March 23:	Possible start date for 1 ½ week overlap with Gregg

#### **D. Additional services included in Conway & Greenwood's approach:**

We always work closely with the client, candidates, and the eventual new hire to ensure a smooth process throughout.

- We set the stage through the process with the candidate so the offer, acceptance and start date typically go smoothly.
- We coach our client to offer clear expectations for the first year and we often pre-arrange scheduled early reviews in the offer letter to ensure the new hire and supervisor so both are on the same page. We like the client to identify three primary goals for each three month period which allows for a dedicated/scheduled time to check on the progress.
- From the time the candidate accepts the offer we coach them through their resignation process to ensure professional resignation.
- We coach the new hire regarding the possibility of their employer's possible attempt to counter their resignation with either a promise of additional compensation or responsibility.
- We stay in touch with both client and new hire until the start date to ensure all is positive and proceeding as planned.
- We touch base regularly with both through the first year of employment to head off any miscommunications and confirm both are pleased.

### **3. Reach and Diversity:**

Conway & Greenwood has always focused on bringing our clients a diverse slate of candidates to all assignments. We know that is a hallmark of good executive search and is the best way to bring value to our clients.

As a SVP and a division manager for GE Capital Mortgage Corporation, I was on the GE's Diversity Team. GE was mostly focused on racial and gender diversity, but certainly diversity goes much further and therefore we search for candidates with a broad diversity in many respects.

One recent example was a search for the new COO at Genworth Mortgage Insurance here in Raleigh. We interviewed huge slate of candidates for this very desirable position. Eventually, I was able to convince a woman from the San Francisco Bay area to relocate her family to Raleigh for the position. She was originally from the Philippines and had moved to the US around twenty years old. She turned out to be a highly regarded executive that Genworth was thrilled to hire.

Another recent example is the hire at RoundPoint Mortgage in Charlotte that moved from California and is from India, but in the process of getting his green card and becoming a citizen.

One of the challenges to diversity in retained search is that the client always has a long list of requirements that they expect. We always make it a point to present a full range of candidates but often they prefer the more senior, experienced candidates and there is often less diversity among that pool. We like to identify the high potential candidates too that may have a little less seniority but high aptitude.

Our practice has always been national and our reach is even global. Most of our assignments are based outside the state of NC. Our proprietary database of clients and potential candidates is national and most of our assignments involve relocating a candidate from one state to another to start the new position. For example we are currently conducting a search in Dallas, TX and will be presenting candidates from coast-to-coast. Please see the assignment list in Appendix A to see locations of a sample of our assignments.

#### **4. Cost and guarantees:**

##### **Fees:**

Conway & Greenwood charges the standard fee structure in the retained search industry. It is a third of the first year income and is payable in three installments. Our agreement is included as Appendix C. We have never had a dispute regarding the agreement and it is very client friendly.

We do not typically need to travel to interview candidates so DHIC should not anticipate any additional fees.

##### **Guarantee:**

Conway & Greenwood offers a one year as part of our standard agreement, but we very seldom ever need to deliver on it. If we do, it is usually because of some extenuating circumstance that was unforeseen by the client or in the candidates' life.

## 5. Staffing/Consultants:

Paul Conway



Paul Conway will be the primary consultant and will be managing every aspect of the search. We purposely do not use junior level consultants because they cannot represent our client as well. We do however use researchers for some assignments that will help supply names of possible candidates from our various sources, but believe that our client expects the highest level of professionalism, so the actual contact with the referral source or potential candidate comes from the consultant directly.

In addition to over 20 years in executive search consulting, Paul brings a full career in mortgage finance with deep experience in affordable housing. That experience and knowledge of the subject matter creates credibility with candidates and allows for more substantive interviews and insight into the candidate's qualifications.

### **Bio: Paul Blackwell Conway, Jr., CMB**

Paul is CEO of Conway & Greenwood, a retained executive search consulting firm. He leads its national financial practice and its regional, generalist practice. The firm is recognized as one of the top in the nation with hallmarks of integrity, professionalism and performance.

Prior, he held positions of Head of Capital Markets, National Production Manager, and President at *Cameron-Brown (Wells Fargo)*, *Verex Assurance*, *Congressional Mortgage*, *Southeastern Savings Bank*, *PMI*, and *GE Capital Mortgage Corp.*

Paul graduated from the *Kenan-Flagler Business School* at *University of North Carolina, Chapel Hill* where he was a varsity letterman. He also graduated "With Distinction" from the School of Mortgage Banking at *Northwestern University*. He was awarded with the *Master CMB* designation by the *Mortgage Bankers Association of America*.

His volunteer work includes St. David's School, Board of Trustees; UNC Kenan-Flagler Parents Council; Holy Trinity Anglican Church, Founding Member and Vestry Member; and BSA Troop 395, Chaplain.

Bill Goodwin



Bill Goodwin will serve as the backup consultant and will be aware of the progress of the search and could step in if needed. Our offices are side-by-side and we catch up daily. We have been friends from church for years and formed a strategic partnership in 2015. Bill also brings over twenty years of executive search experience.

## **6. References:**

**Client:**       **North Carolina Railroad Company (an economic development entity owned by the state of NC)**

Assignments: VP Real Estate, Staff Engineer, and Director of Communications

CEO:           Scott Saylor  
Office: (919) 954-7601 X223  
Email: [scottsaylor@ncrr.com](mailto:scottsaylor@ncrr.com)

VP RE:       Andrew Tate (828) 808-2817 for longtime VP Chuck Burnell

Engineer:     Donald Arant (704) 575-7321

Dir Comm.:   Megen Hoenk (919) 449-6976

**Client:**       **North Carolina Housing Finance Agency**

Assignment:   Executive Director

Chair:         Joseph D. "Joe" Crocker, Director  
Poor and Needy Division  
Kate B. Reynolds Charitable Trust  
Office: 336-397-5503  
Cell: 336-757-2984  
Email: [joe@kbr.org](mailto:joe@kbr.org)

ED:            Scott Farmer (919) 906-0072 for longtime ED Bob Kucab

**Client:**       **Disability Rights North Carolina**

Assignment:   Executive Director

Chair:         Bryan Dooley  
[dooleybg@guilford.edu](mailto:dooleybg@guilford.edu)

Board:        Rachel Fuerst, Henson & Fuerst Law Firm (may be able to respond more quickly than Bryan to an oral inquiry) (919) 781-1107

ED:            Virginia Knowlton-Marcus (919) 856-2195 for longtime ED Vicki Smith

**Client:**       **Brain Injury Association of North Carolina**

Assignment:   Executive Director

Chair:         Marty Foil  
ED, Hinds Feet Farm  
Cell: (704) 634-7059  
Email: [mfoil@hindsfeetfarm.org](mailto:mfoil@hindsfeetfarm.org)

ED:            Daniel Pietrzak (919) 464-1494

**Client:**       **Dewitt Carolinas**

Assignments: CFO, and Senior Project Manager

CEO:           Todd Saieed  
Email: [todd.saieed@dewittcarolinas.com](mailto:todd.saieed@dewittcarolinas.com)  
Cell: (919) 422-2903

CFO:           Ed Soccorso (704) 609-5660

Sr. PM:        Su-Hou Chen (919) 605-9861

**Client:**       **LoanCare (a Fidelity and Black Knight subsidiary)**

Assignments: COO (note other assignments for Dave at RoundPoint Mortgage Servicing)

CEO:           Dave Worrall  
Email: [DWorrall1@gmail.com](mailto:DWorrall1@gmail.com)  
Office: (757) 452-5555

COO:           Adam Saab (972) 951-0217

**Office:**

Conway & Greenwood's office is located near downtown Raleigh and in good proximity to DHIC's office which will facilitate ease in setting meetings or stopping by as needed:

Conway & Greenwood  
766 E. Whitaker Mill  
Raleigh, NC 27608






Main number: (919) 833-9000

Direct office line for Paul Conway is (919) 833-4800

Cell for evenings and weekends: (919) 625-5400

Email: [pconway@conwaygreenwood.com](mailto:pconway@conwaygreenwood.com)

Appendix A:  
Sample Search Assignments (incomplete list):  
**SAMPLE SEARCH ASSIGNMENTS**

 <p>Pacific Union Financial Los Angeles, CA and Dallas, TX</p> <p>Privately held national mortgage lender and assisted in relocating the home office from CA to TX.</p> <ul style="list-style-type: none"> <li>• President</li> <li>• SVP, Capital Markets</li> <li>• SVP, D2C Channel</li> </ul>	 <p>Pedestal Capital New York, NY</p> <p>An online trading platform, backed by private equity firm Battery Ventures, Boston, MA.</p> <ul style="list-style-type: none"> <li>• President &amp; CEO</li> <li>• Managing Director, Trading</li> <li>• Trader</li> <li>• National Account Executive</li> <li>• National Account Executive</li> <li>• National Account Executive</li> <li>• National Account Executive</li> <li>• National Account Executive</li> </ul>
 <p>IBERIA Bank, Littlerock, AR and Dallas, TX</p> <p>A commercial bank in 10 states with \$21B in assets.</p> <ul style="list-style-type: none"> <li>• SVP, Capital Markets and Secondary Marketing</li> <li>• SVP, Credit Policy</li> </ul>	 <p>Pacific Investment Management Company (PIMCO) Newport Beach, CA</p> <p>A multinational investment management company with over \$1.5 Trillion assets under management.</p> <ul style="list-style-type: none"> <li>• SVP, Senior Mortgage Default Manager</li> </ul>
 <p>Pingora Asset Management Denver, CO, Richmond, VA and Los Angeles, CA</p> <p>Multiple MSR acquisition funds backed by Sterling PE and later Hatteras PE and Bayview.</p> <ul style="list-style-type: none"> <li>• COO</li> <li>• VP, Eastern Regional Business Development</li> <li>• VP, Western Regional Business Development</li> <li>• MSR Transaction Manager</li> </ul>	 <p>Washington, DC; Dallas, TX; Chicago, IL; Atlanta, GA; and Philadelphia, PA</p> <p>The fifth largest financial institution in the world by revenues.</p> <ul style="list-style-type: none"> <li>• VP, Customer Delivery Team Leader, Southern California</li> <li>• VP, Customer Delivery Team Leader, Southern California</li> <li>• Regional Corporate Account Manager, Southwest</li> <li>• Regional Corporate Account Manager, Southwest</li> <li>• Regional Corporate Account Manager, Southwest</li> <li>• Regional Corporate Account Manager, Midwest</li> <li>• Regional Corporate Account Manager, Midwest</li> <li>• Regional Corporate Account Manager, Midwest</li> <li>• Regional Corporate Account Manager, Southeast</li> <li>• Regional Corporate Account Manager, Southeast</li> <li>• Regional Corporate Account Manager, Southeast</li> <li>• Regional Corporate Account Manager, Northeast</li> <li>• Regional Corporate Account Manager, Northeast</li> <li>• Regional Corporate Account Manager, Northeast</li> </ul>





Cape Fear Bank  
Wilmington, NC

Publically traded commercial bank.

- President & CEO, Commercial Bank



First Bank  
Troy, NC.

5th largest commercial bank in NC.

- President & CEO, Commercial Bank



MidAmerica Bank  
Naperville, IL

- SVP, Secondary Marketing
- VP, Secondary Marketing and Analytics



KHH Financial  
Chicago, IL

KHH Financial is the sub of the national homebuilder.

- President & CEO, Mortgage Company



AIG United Guaranty, Greensboro, NC.

A national mortgage insurance company and subsidiary of AIG and sold to Arch MI

- SVP, National Account Division Manager
- SVP, Corporate Risk Division Manager
- VP, Credit Policy Department Manager
- VP, Product Development Department Manager



Genworth  
Financial

Genworth Financial, Raleigh, NC.

Publically traded spinoff of the insurance related businesses from GE Capital with revenues over \$8B. Specializes in long term care insurance and mortgage insurance.

- COO, SVP
- Pricing Analyst
- Financial and Modeling Analyst



SunTrust Mortgage  
Richmond, VA.

The mortgage subsidiary of SunTrust Bank.

- VP, Secondary Marketing Manager
- VP, Product Manager



Optimal Blue, Denver, CO.

A capital markets hedging and pricing software company backed by PE firm GTCR.

- SVP, Capital Markets
- SVP, Capital Markets
- VP, Business Development
- VP, Business Development



LoanCare/ServiceLink  
Virginia Beach, VA

A top 15 servicer owned by ServiceLink.

- COO, Chief Operating Officer



Wells Fargo Home Mortgage  
Clayton, MO

Leading national mortgage originator and servicer.

- SVP, Corporate Modeling and Forecasting



E\*Trade Financial  
Los Angeles, CA

E-Trade Financial Corporation is a financial services company headquartered in New York City. It is an online discount stock brokerage firm for self-directed investors.

- SVP, Compliance
- SVP, Product Development



LoanCity/Bank of America Securities  
San Jose, CA

With backing from Bank of America Securities, this independent mortgage banker grew to be a leading national wholesaler.

- CCO, Chief Credit Officer
- SVP, Managing Director, Capital Markets
- SVP, National Underwriting Manager
- VP, Secondary Marketing Manager



RMIC  
Winston-Salem, NC and Boston, MA

A national mortgage insurer owner by Old Republic.

- National Account Manager
- Regional Manager
- Account Manager
- Account Manager
- Account Manager
- Training and Development Manager



The Office of Mortgage Settlement Oversight  
Raleigh, NC

The historic, \$25 Billion settlement between the Federal Government, 49 State Attorney Generals, and the largest five servicers (Ally/GMAC, Bank of America, Citi, JPMorgan Chase and Wells Fargo).

- Director, PPF Oversight
- Director, PPF Oversight



Raleigh, NC  
\$30 Billion bank in 18 states.

- Regional Commercial Banker
- Regional Commercial Banker



Principal™

Des Moines, ID and Baltimore, MD

- SVP, National Underwriting Manager
- SVP, Eastern Regional Sales Director



Mill Valley, CA and Denver, CO.

Publically traded REIT and issuer of private label securities.

- VP, Capital Markets



Raleigh, NC.

A SEC-registered, investment management firm and an affiliate of Medical Mutual Insurance Company.

- Client Capital Management, Business Development Executive
- Client Capital Management, Business Development Executive



Macquarie Bank  
Memphis, TN

Australian bank's US subsidiary.

- SVP, National Production Manger
- VP, Wholesale Area Manager
- VP, Wholesale Area Manager
- Correspondent Business Development Manager
- Correspondent Business Development Manager
- Correspondent Business Development Manager
- Correspondent Business Development Manager
- Correspondent Business Development Manager
- Wholesale Account Executive
- Wholesale Account Executive
- Wholesale Account Executive



Minneapolis, MN and Fort Washington, PA.

A top five lender with sophisticated securitization capabilities.

- COO, MD, National Operations HCFN
- SVP, Global Capital Markets Interest Rate Risk Manager
- SVP, National Underwriting Manager
- SVP, Managing Director, Interest Rate Risk Management
- SVP, National Quality Control Manager
- SVP, National Business Development and Sales Manager
- SVP, Eastern Regional Operations and Sales Manager
- SVP, Western Regional Operations and Sales Manger
- VP, Secondary Marketing Pricing Manager
- VP, E-Commerce Product Manager
- VP, Northeast Regional Operations Manager
- VP, Northwest Regional Operations Manager



Sidus Financial/Yadkin Bank  
Greenville, NC and Bedford, NH

Residential lending arm of Yadkin Bank/F.N.B.

- SVP, Corporate Operations Manager
- SVP, Secondary Marketing Manager
- SVP, Secondary Marketing Manager
- SVP, National Compliance Manager
- SVP, National Underwriting Manager
- VP, IT Manager
- VP, Regional Sales Manager
- VP, Marketing and Reverse Channel Manger
- VP, Regional Operations Manager
- Account Executive
- Account Executive
- Account Executive



Dorado/CoreLogic  
San Jose, CA and Chicago, IL

Dorado.com bought by CoreLogic a software company backed by private equity Cross Point Venture Partners.

- SVP, National Sales Manager
- VP, National Account Sales Manager
- VP, National Account Sales Manager
- VP, National Account Sales Manager



Capital Markets Cooperative  
Ponte Vedra Beach, FL

A hedging and interest rate risk management and services company backed by Wilbur Ross private equity.

- CCO, Chief Compliance Officer



Shea Financial  
Los Angeles, CA

America's largest privately owned homebuilder and its financial subsidiary.

- SVP, Secondary Marketing



Southern Trust Mortgage  
Virginia Beach, VA and Annapolis, MD

A bank-sponsored regional lender, with Southern National Bank and Eastern Bank as investors.

- Subservicing and Securitization Officer
- Regional Production Managers



LoanSifter  
Appleton, WI

An early stage software company and pricing engine.

- SVP, National Client Services Manager



Atlanta, GA

A privately held top 25 originator.

- SVP, National Credit Policy Manager
- SVP, National Underwriting Manager
- VP, Operations Manager



Horsham, PA

A commercial bank sub of General Motors Acceptance Corporation.

- VP, Financial Modeling and Analytics



MORTGAGE BANKERS ASSOCIATION

Mortgage Bankers Association of America

Washington, DC

Trade association for the mortgage bankers.

- Director, Research and Economic Forecasting



Aurora Bank

New York, NY

Owned by investment banker Lehman Brothers

- VP, Product Development



Raleigh, NC

Regional lending subsidiary of Gateway Bank the Bank of Hampton Roads.

- VP, Underwriting Manager



Philadelphia, PA

A global BPO company.

- National Account Sales Executive
- National Account Sales Executive
- National Account Sales Executive



Atlantic Bay Mortgage Group

Virginia Beach, VA

Privately held regional lender.

- VP, Operations Manger
- VP, Regional Manager



First Federal Bank

Charleston, SC

Commercial bank, later sold to SCBT

- VP, Compliance Officer



San Jose, CA.

A \$200M subsidiary of News Corp, the organization is a leading provider of online real estate services and operates the Move network of real estate websites and mobile experiences for consumers and real estate professionals.

- North America, GM



Raleigh, NC

Commercial Bank in 18 states with \$30B in assets.

- Regional Commercial Banker
- Regional Commercial Banker



American Home Mortgage  
Melville, NY

A publically traded national financial company and top ten mortgage lender.

- SVP, COO
- VP, Controller



Raleigh, NC

A top ranked HFA nationally with over \$17 Billion financed.

- Executive Director



Fort Lauderdale, FL

A publically traded national specialized and subprime servicer.

- VP, Servicing Acquisitions



Columbus, OH

14<sup>th</sup> largest homebuilder in the US.

- Regional Manager



Incenter Mortgage Advisors  
Denver, CO

An industry leader in MSR Valuation and Sale and sub of the Blackstone Group.

- Director of MSR Hedging



RoundPoint Mortgage Servicing  
Charlotte, NC

A national top 25 servicer backed by Tavistock PE, Dallas, TX.

- SVP, General Counsel
- SVP, Chief Risk Officer
- MSR Transaction Manager



Leadership North Carolina, Raleigh, NC.

An independent, nonpartisan 501(c) (3) non-profit organization that engages current and emerging leaders from across the state of North Carolina.

- President & CEO



The YMCA, Raleigh, NC.

One of the largest non-profit organizations in the state with revenues of \$85.8M.

- CFO



NOMACORC

NomaCorc  
Zebulon, NC.

A privately held global supplier of synthetic wine closures.

- CFO
- Director, Head of HR
- Communications Manager



Wake Med  
Raleigh, NC

A regional hospital organization with 5,572 FTEs.

- President & CEO



DowntownRaleigh

The Downtown Raleigh Alliance, Raleigh, NC

A business improvement district.

- President & CEO
- President & CEO
- President & CEO

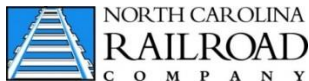


WITH PURPOSE. WITH PROMISE.

The Morehead-Cain Foundation  
Chapel Hill, NC.

The premier four-year merit scholarship program to the University of North Carolina at Chapel Hill.

- Treasurer



The NC Railroad Company  
Raleigh, NC

An Economic Development company with state ownership.

- VP, Real Estate
- Director, Engineering
- Director, Communications



WASTE INDUSTRIES

Waste Industries  
Raleigh, NC

A solid waste and recycling company with \$1B in revenues and operations in 7 states.

- VP, Strategy, Acquisitions, and Business Development



Cary, NC.

A \$3B+ leader and developer of analytics software.

- VP, R&D
- VP, Retail



emma

Nashville, TN.

SaaS company in the digital marketing space.

- CFO



Red Hat  
Raleigh, NC.

An 8,000 employee organization that delivers an open source stack of trusted, high performance technologies that solve business problems.

- Country Manager, Brazil



Hickory, NC.

Family owned \$800M manufacturing company.

- Two Independent Board Members
- Director, Talent Management



Durham, NC.

A privately held, tax revenue and GIS Software Developer.

- COO/CEO Succession
- Manager, Software Development

FUTURES

Durham, NC.

An early stage software and services firm in the human capital space.

- President and Chief Technology Officer
- VP, Sales



Columbus, OH.

An \$800M software company, which was acquired by IBM.

- Chief Information Officer
- SVP, Professional Services, Americas
- SVP, Professional Services, EMEA
- VP, Managed Services
- VP, North American Sales



Raleigh, NC.

Big Data Integration Software and Services Company.

- SVP, Global Sales





New York, NY.

A \$350M Legal Services firm backed by Carrick Capital.

- SVP, Client Service
- VP, Global Compensation & Benefits
- VP, Corporate Transactions Leader, EMEA
- VP, Corporate Transactions Sales, US
- VP, Managed Services Delivery
- VP, Leader Managed Services Sales
- VP, Lead Client Partner, US Banking
- VP, Banking Industry Leader, Insourcing & Managed Project Sales
- Director, Global Talent Acquisition
- Director, Financial Services Sales Leader
- Director, Global Delivery, London
- Director, Managed Services Sales
- Director, Global Solution Design
- Practice Manager, Hong Kong
- Practice Manager, New York
- Practice Manager, London
- Engagement Manager, Strategy & Delivery, London



New York, NY.

Global Accounting, Audit, and Consulting holding company with 80 member firms.

- Partner, Financial Services
- Senior Manager, Infrastructure - Global Audit Product Rollout



Cleveland, OH.

SaaS provider of a mobile workforce management solution. Backed by Technology Crossover Ventures, Sutter Hill Ventures, Draper Triangle Ventures, and Intel Capital. Acquired by Oracle.

- CFO
- CMO
- Chief People Officer
- SVP & GM, Americas
- VP, Sales, North America
- VP, Sales, Middle Market (Atlanta)
- VP, Customer Operations
- VP, Business Development and Alliances
- VP, Product Marketing & Strategy
- Director, West Coast Sales
- Director, Relationship Management Team
- Relationship Manager, Cox Communications



Franklin, TN; New York, NY; London, UK.

An unstructured data analytics cognitive computing software company based in Franklin, TN. Backed by Goldman Sachs, Credit Suisse Ventures and several partners from Silverlake Partners.

- CFO
- CMO
- Chief Product Officer
- SVP, Services
- SVP, Commercial Sales
- SVP, Software Engineering
- VP, People & Culture
- Director, Talent Acquisition
- Director, Sales Engineering
- Sales Engineer, New York
- Sales Engineer, London



Chicago, IL.

A leading global professional services company.

- Partner, Strategy, Resources
- Partner, Strategy, Financial Services
- Partner, Strategy, Banking



Cary, NC.

A privately held, leading, global Contract Research Organization with \$300M+ in revenue.

- CFO, North America



Cary, NC.

A privately held, leading, global Contract Research Organization with \$300M+ in revenue.

- CFO, North America



Raleigh, NC.

An enterprise level software company with award winning solutions in the area of mobile data capture, delivery and forms automation.

- CEO



LexisNexis™

New York, NY.

A global provider of content-enabled workflow solutions.

- Senior Director, Strategy, Practice Management Software

ZV Pate, Inc.

Laurinburg, NC.

A privately held conglomerate with multiple fast food franchises, John Deere dealerships, oil and gas distributors, and forest/land holdings.

- CEO



Mooresville, NC.

A \$50B+ retailer.

- Director, Measure & Evaluate, Marketing/CRM Analytics
- Director, IT Solutions – Mobility
- Mobile Application Portfolio Manager



Raleigh, NC.

Bob Barker Company is one of the nation's largest detention suppliers.

- Two Independent Board Members



Raleigh, NC.

Consulting arm of one of the largest Contract Research Organizations.

- Senior Director, Change Management and Process Optimization



Winter Park, FL.

A multi-family housing real estate private equity company.

- CFO



#### IT & BPO Outsourcing:

- Client Solutions Executive – IT Outsourcing
- Client Solutions Executive – IT Outsourcing
- Client Solutions Executive – IT Outsourcing
- Client Solutions Executive – BPO
- Client Solutions Executive – BPO
- Global BPO Procurement Partner
- Global Technology Services Global Solutions Leader, F&A & Procurement
- Global Delivery Executive Partner
- Business Development Executive – F&A Outsourcing
- Business Development Executive – Human Resources Outsourcing
- Business Development Executive – Procurement Outsourcing

#### Management Consulting:

- Partner, Business Analytics & Optimization, Financial Services, Banking
- Partner, Business Analytics & Optimization, Financial Services ECM
- Partner, Business Analytics & Optimization, Industrial
- Partner, Business Analytics & Optimization, Media & Entertainment
- Partner, Business Analytics & Optimization, Life Sciences
- Partner, Business Analytics & Optimization, Consumer Packaged Goods
- Partner, Business Analytics & Optimization, Analytics Strategy Leader
- Core Account Partner – Disney
- Core Account Partner – Time Warner
- Partner – Oracle eBusiness
- Partner – Oracle PeopleSoft
- Partner – SAP Distribution
- Partner – SAP Stadium
- Partner – SAP Cross Industry
- Partner – SAP HR
- Partner – SAP Life Sciences
- Partner – SAP HCM
- Partner – Customer Care & Billing
- Partner – Strategy & Transformation, Financial Services
- Partner – Strategy & Transformation, Industrial
- Partner – Strategy & Transformation, Life Sciences
- Partner – Strategy & Transformation, Electronics/Hi-Tech
- Partner – Strategy & Transformation, Customer Experience Strategy
- Partner – Strategy & Transformation, Healthcare Transformation
- SAP Senior Program Manager
- Associate Partner – SAP Project Manager
- Associate Partner – Customer Care & Billing Practice
- Associate Partner – Oracle West Coast
- Associate Partner – Strategy & Transformation



Cary, NC and Philadelphia, PA.

A \$100M division of \$2B Buhler, manufacturer of commercial drying equipment.

- Director of Engineering
- Mechanical Engineer
- Mechanical Engineer



Greensboro, NC.

A regional leader in commercial office furnishings and Herman Miller design and sales consultant.

- GM, Piedmont Region



Raleigh, NC.

The company provides IT consulting, network design and support, implementation and integration services to small to medium businesses in the Raleigh-Durham, NC area.

- GM, North America



RTP, NC.

A technology company that developed and sells a nuclear density gage for commercial application in the construction of asphalt highways worldwide.

- VP, Global Sales and Marketing
- Director, Engineering



Franklin, TN.

A privately held healthcare technology company that specializes in genetic testing.

- Chief Product Officer



Greensboro, NC.

A Recovery Audit Technology & Services Company.

- SVP, Global Marketing
- VP, Product Management
- Director, Audit Operations, West
- Director, Audit Operations, Banking



Atlanta, GA.

A \$60M leader in customer interaction analytics software and services. Recently acquired by Nice Systems.

- SVP, Consulting and Professional Services



Raleigh, NC.

Designer and producer of needlework tapestry kits and wool sold direct. Working directly with entrepreneur Bob Young, the Founder of Red Hat.

- President/COO









Atlanta, GA.

A global payment technology solutions company with revenues over \$11B.



New York, NY.

A revolutionary, global company that conducts and manages project work for leading multinational life sciences companies across Europe, Asia, and North America.

<ul style="list-style-type: none"> <li>SVP, Apple Pay</li> </ul>	<ul style="list-style-type: none"> <li>US Commercial Leader</li> </ul>
 <p>Honolulu, HI.</p> <p>A 50 year family owned fast food chain restaurant with 24 locations throughout the state of Hawaii.</p> <ul style="list-style-type: none"> <li>VP, Marketing</li> <li>VP, Operations</li> <li>VP, Training</li> </ul>	 <p>San Jose, CA.</p> <p>A \$1B leader in electronic design automation software and hardware.</p> <ul style="list-style-type: none"> <li>VP, Professional Services</li> <li>VP, Industry/Foundry Relations</li> <li>VP, Design for Manufacturability Engineering</li> </ul>
 <p>Little Rock, AR.</p> <p>A technology, content and data management, and marketing services company.</p> <ul style="list-style-type: none"> <li>Director, Marketing</li> </ul>	 <p>Detroit, MI.</p> <p>A warranty claims outsourcer and Portfolio Company of Court Square Ventures.</p> <ul style="list-style-type: none"> <li>CEO</li> </ul>
<p><u>Unicorn ML</u></p> <p>Durham, NC.</p> <p>A machine learning/AI technology company.</p> <ul style="list-style-type: none"> <li>CEO</li> </ul>	 <p>New York, NY.</p> <p>A 750 employee, Big Data Analytics Software and Services Company.</p> <ul style="list-style-type: none"> <li>Chief Architect</li> <li>Director, Software Solutions</li> <li>Director, Professional Services</li> </ul>
 <p>Mumbai, India.</p> <p>A global provider of IT, BPS and consulting services with over 10,000 employees worldwide.</p> <ul style="list-style-type: none"> <li>VP/GM of North America</li> </ul>	<p><b>PERGO</b></p> <p>Garner, NC.</p> <p>A \$350M manufacturer of laminate flooring.</p> <ul style="list-style-type: none"> <li>VP, Marketing</li> </ul>



Phoenix, AZ.

A provider of market-leading software and services with \$347M+ in annual revenue.

- Solutions Delivery Director



Atlanta, GA.

Provider of technology to the hospitality and retail industries that was acquired by NCR.

- Board of Directors (Three seats)



Raleigh, NC.

A developer of healthcare communication solutions, and a subsidiary of ASCOM Sweden, provides system users with greater freedom of movement, better service, and increased safety.

- GM, North Americas



## **NCHFA Executive Director Raleigh, NC**

**Conway & Greenwood** has been retained by the **North Carolina Housing Finance Agency** to manage its search for the position of **Executive Director** located in its Raleigh, NC office.

**The North Carolina Housing Finance Agency** is one of the most accomplished and respected HFA's in the country, with an excellent track record of service to the citizens of the state and its constituents. The NCHFA is a self-supporting public agency. The Agency's mission is to create affordable housing opportunities for North Carolinians whose needs are not met by the market. Since its creation in 1973 by the General Assembly, the Agency has financed nearly 240,000 affordable homes and apartments, totaling \$17.4 billion.

The Agency provides financing through the sale of tax-exempt bonds and management of federal tax credit programs, the federal HOME program, the state Housing Trust Fund, Treasury's Hardest Hit Fund and other programs. The Agency has recently undertaken a significant role with the NCDHHS in providing community living options for persons with disabilities. Using these resources and its earnings, the Agency:

- Offers low-cost mortgages and down payment assistance for qualified homebuyers.
- Finances affordable homes and apartments developed by local governments, nonprofit organizations and private owners.
- Finances the development of housing for people with special needs.
- Finances the rehabilitation of substandard owner-occupied homes.
- Offers foreclosure prevention assistance in partnership with HUD-approved housing counseling agencies statewide.
- Administers HUD rent assistance contracts for 25,000 privately owned apartments.

The Agency has a staff of 110 professionals based in Raleigh, North Carolina. This dedicated staff is committed to the mission of the agency and many team members are significantly long-term employees. As one executive said, "You may not come to the NCHFA for the mission, but you will stay here for the mission."

The Agency is an active member of the National Council of State Housing Finance Agencies (NCSHA), which represents Housing Finance Agencies (HFAs) in each state, the District of Columbia, Puerto Rico and the US Virgin Islands.

The Agency operations are overseen by a geographically and professionally diverse 13-member Board of Directors. The Governor, President of the state Senate, and Speaker of the House of Representatives each appoints four members, and these twelve members elect a thirteenth. The Governor appoints the Chairman and the Vice Chairman, and the Board meets approximately ten times each year, and as needed, and meetings are efficiently conducted. The Board of Directors appoints the Agency's Executive Director, subject to approval by the Governor; and the Executive Director hires all staff and approves compensation levels. The Agency's statute describes its board composition, general powers, program authority and financing capability.

The Agency reports its budget through the Office of State Budget and Management in the Governor's office and has ongoing state reporting requirements. However, operationally the Agency has substantial autonomy. Its financial accounts are audited annually by an independent auditing firm. The Agency's bonds are rated AA by Standard & Poor's and Aa2 by Moody's and bond sales are approved by the state's Local Government Commission. The Agency does control its own financing team.

In 2015, the Agency's work:

- Financed 10,300 affordable homes and apartments.
- Financed \$1.3 billion in housing construction, rehab and home sales.
- Administered rent assistance for 25,910 North Carolina families.
- Supported 14,200 construction jobs.
- Produced \$76 million of state and local tax revenues.
- Held operating expenses to below 2% of the real estate activity it leveraged.

The NCHFA is a valuable resource and serves a critical mission for the citizens of the state of North Carolina. Please visit [www.nchfa.com](http://www.nchfa.com) for more information.

**The Executive Director** of the NCHFA must be a talented executive that can implement and manage the Agency's strategic and tactical objectives. In addition to the day-to-day operations, he or she must build effective relationships with external constituents and work well with/for the Board of Directors. This blend of skill sets must be coupled with the core knowledge of the Housing Finance/Mortgage Industry so as to understand and lead the various business lines of the Agency.

Proven management and interpersonal skills, both internal and external, are likely the most critical skill set that the new Executive Director will need. Internally, the candidate must be able to effectively lead a team of strong managers without micromanaging, while still understanding the fine details of each of their business lines. The management culture has developed into a balanced team of professionals with participatory decision making. It is critical that the divisions are fully supported as the strategic objectives and deliverables for each business unit are developed and implemented. The ability to listen while leading will be an important character trait for the appropriate candidate, as the culture at the Agency is one that values each staff member for the role he/she plays within the organization.

External management falls into multiple categories that include managing relationships in the state legislature, state government, industry trade groups, and outside business partnerships. It is imperative that the Executive Director have the ability to develop relationships on both sides of the political aisle and appear neutral in the areas of party politics.

In addition to relationship management, it is important to establish credibility and confirm the value proposition of the NCHFA. Since the Agency has a long track record of significant credibility and value, the new Executive Director will be able to leverage that positive standing with each of those affiliations, and in time, establish his or her own credibility with each of those relationships as well. Experience working with a Board of Directors is another key area of expertise. Candidates who can show a track record from prior board management/working relationships will be highly regarded.

Candidates must present a resume of relevant experience that aligns well into the businesses that the Agency manages. The Agency uses a wide variety of financing structures and candidates with tax-exempt experience will be valued. Certainly candidates with experience at a Housing Finance Agency, either at the state level or regional, may have particularly applicable experience. Knowledge of the



current federal regulatory environment and how it impacts the areas of mortgage lending and servicing and lending is helpful. With full P&L responsibility for the agency, a significant financial toolkit/experience in the areas of budgeting and planning is necessary. Although most candidates may come from banking or finance backgrounds, we are open to candidates who may have different backgrounds but still relate directly to the work and mission of the agency.

The Executive Director is the “face of the agency” and must fit naturally into that aspect of the position. He or she will be present at numerous events and will appreciate the opportunity to forward the mission and causes of the agency, and to support others in similar entities as well. The Executive Director must be particularly well spoken and insightful with a strong sense of appropriateness, integrity and professionalism, both in informal conversation, as well as formal presentations.

And finally, it will be important that the Executive Director fully supports the [mission and values of the NCHFA](#). This is important not only for internal leadership, but also to properly portray the mission and values to its external constituents.

Conway & Greenwood is seeking a range of candidates for this excellent opportunity. We will consider various backgrounds, but candidates must offer the experience, knowledge, and skill sets that overlay this demanding position. The compensation and benefits package are attractive and appropriate for the scope of this position. A relocation allowance may be negotiated if applicable.

This is an exceptional opportunity to serve and contribute to the mission of the NCHFA in this critical leadership role. Candidates must therefore possess superior qualifications and integrity. Please direct all inquiries to Paul Conway at [pconway@conwaygreenwood.com](mailto:pconway@conwaygreenwood.com). *All inquiries will be handled in a confidential manner.*

**About Conway & Greenwood, Inc.**

**Conway & Greenwood** is a national executive search firm that offers the highest levels of integrity and an excellent track record of over 15 years. Our consultancy is a leader nationwide and is repeatedly retained because we deliver at a superior level for our clients; both the candidate clients and the corporate clients. The firm has established successful, long-term, relationships with many of the nation's leading companies and we employ this expertise and philosophy of partnership with our clients in every search that we manage. For additional information, please visit our website at [www.conwaygreenwood.com](http://www.conwaygreenwood.com).



**Executive Director**  
**Disability Rights North Carolina**  
**Raleigh, NC**

**Conway & Greenwood** has been retained by **Disability Rights North Carolina** to manage the search for its **Executive Director**. The position will be located in **Raleigh, NC**.

**Disability Rights North Carolina** has been the federally-mandated protection and advocacy (P&A) system for people with disabilities in North Carolina since July 1, 2007, continuing the work previously conducted by Carolina Legal Assistance and the Governor's Advocacy Council for Persons with Disabilities (GACPD). After the discovery of widespread abuse nearly 40 years ago, federal law mandated that every state and U.S. territory designate one agency charged with protecting the rights of all people with disabilities living in the state or territory.

Disability Rights NC is the only nonprofit organization in North Carolina that protects the rights of people with every type of disability (e.g. physical impairments, mental illness, developmental disabilities, sensory impairments, neurological impairments, traumatic brain injury, etc.).

As a legally-based advocacy organization, Disability Rights NC has a staff of attorneys and others knowledgeable in the laws protecting people with disabilities and can take legal action to effect change impacting large populations.

Disability Rights NC employs a blend of investigatory action, individual representation, educational outreach, and systems advocacy so that the 2 million children and adults with disabilities living in North Carolina may have a full opportunity to live with dignity in the community of their choice.

Some highlights of Disability Rights NC's important work are as follows:

- Investigate complaints about neglect and abuse and suspicious or unexpected deaths in institutions;
- Represent individuals based on our target areas and case selection criteria;
- Educate people with disabilities about their many legal, civil and service rights;
- Provide technical assistance, training, publications, and advocacy support for North Carolinians with disabilities, as well as their families and representatives;
- Conduct outreach to traditionally underserved ethnic and disability communities;
- Work for changes in public policy to improve the lives of people with disabilities; and
- Bring impact litigation and act as *amicus curiae* (friend of the court) in disability-related cases.

As the result of the foregoing work, Disability Rights NC can point to many successes, including the following:

- Litigation resulting in a settlement requiring the Department of Motor Vehicles to treat drivers with disabilities uniformly and without discrimination in the renewal of drivers' licenses;
- Litigation resulting in a settlement mandating due process before IDD or innovations waiver can be reduced; and
- Litigation requiring the state to fully implement a state statutory requirement (Medicaid Buy-in) that Medicaid and related benefits shall continue as people with disabilities gain employment.

**The Executive Director** is charged with leading a dynamic group of professionals to accomplish Disability Rights NC's critical mission of protecting the legal rights of people with disabilities. The ED must be a champion of persons with disabilities (PWD) with knowledge of the rights, laws, and issues regarding PWD. With significant passion, vision, and action plans, the ED will be comfortable as a leader in this civil rights movement!

Disability Rights NC seeks a strong leader with experience leading similar organizations and teams throughout the broad community of related institutions that also benefit people with disabilities. Breadth of knowledge across the many types of disability organizations and experience is desired. It is possible that some candidates may be particularly deep in only one discipline, but well connected and knowledgeable of how the community as a whole functions.

The ED will bring perspective and vision for the next chapter of Disability Rights NC and the needs of the broad disability community. The ED will translate that vision into achievable steps to increase its visibility and impact.

This leader will have excellent presentation and networking skills to promote the mission and leverage opportunities for Disability Rights NC. He or she will be a well-known advocate and spend significant time out in the community with stakeholders.

Fundraising with individuals, private and corporate entities, and foundations will play a more important role at Disability Rights NC than in the past. The relationships and skill sets needed to be an effective fundraiser are an important requirement for the next ED.

An excellent working knowledge of the applicable laws and the legal process is required. A candidate with experience as a lawyer may have an advantage in this area, but it is possible that other candidates will have the overall knowledge and skills needed.

The next chapter for Disability Rights NC will see an organization that will draw upon the excellent foundation established in its first ten years. The organization will make strategic gains that will have an even greater impact for the citizens of NC broadly and for people with disabilities specifically.

The next Executive Director will be a catalyst for even more change and impact. He or she will galvanize the staff, board, and other stakeholders to pull together to fight for those that need representation in order to improve the quality of life for people with disabilities across NC. Therefore, we are seeking talented, passionate candidates with excellent credentials for this important work.

The Board of Directors takes its responsibility to find the best ED seriously and is focused on conducting a highly professional search process. The BOD encourages all candidates that meet the qualifications set forth herein to contact Conway & Greenwood. Individuals with disabilities are encouraged to apply and accommodations will be provided, as requested, throughout the interview process. Please direct all inquiries to Paul Conway at [pconway@conwaygreenwood.com](mailto:pconway@conwaygreenwood.com) or directly at (919) 833-4800. ***All inquiries will be handled in a confidential manner.***

*About Conway & Greenwood, Inc.*

*Conway & Greenwood is a national executive search firm that specializes in retained search assignments to recruit senior level executives. The consulting firm has successful long-term relationships with many of the nation's leading organizations. Conway & Greenwood's hallmark is its commitment to professionalism and integrity which translates to excellent value for its clients. Conway & Greenwood subscribes to a Code of Ethics and Professional Practice Guidelines that form the foundation of the practice.*



**Single Family Business**  
**VP, Customer Delivery Team Leader, SoCal**  
**Washington, D.C.**

**Conway & Greenwood** has been retained by **Fannie Mae** to manage its search for the **Customer Delivery Team Leader** for **Southern California**. The Customer Delivery Team Leader position will work from Fannie Mae's home office in **Washington, DC**.

**The Federal National Mortgage Association ("Fannie Mae")** is a leading source of residential mortgage credit in the U.S. secondary market. Fannie Mae is supporting today's housing recovery and helping to build a sustainable housing finance system. Fannie Mae provides reliable, large-scale access to affordable mortgage credit across the country at all times so people can buy, refinance, or rent homes. Fannie Mae is committed to being its customers' most valued housing partner and delivering the products, services, and tools its customers need to serve the entire market efficiently and confidently.

Fannie Mae's **Single Family** business has undergone a revitalizing transformation through its "Way of Working" (WoW). WoW is rooted in Lean Management principles that drive a culture shift to constantly seek out better ways of working, which are centered around the customer's needs. WoW is supported by a series of lean management tools that actually change the way Fannie Mae employees work in a meaningful way, through the use of daily huddles, structured problem solving methodologies, defining standard work and robust coaching and feedback. These tools work in conjunction with one another and taken together represent the integrated and holistic nature of the lean management system.

Lean management will give Fannie Mae's teams and people the tools, responsibility, and authority not only to do their jobs, but to improve how they do their jobs. Today, some of the top companies in financial services run their entire organizations using lean management.

To facilitate the cultural shift, the Single-Family business is reorganizing and creating **Customer Delivery Teams (CDTs) and End-to-End business leaders**. While introduction of WoW starts with the CDTs, it will be implemented throughout the SF business at all levels over time.

The Customer Delivery Team is a cross functional team with about 15 members that is fully dedicated to a set of customers. CDTs are designed to fundamentally orient the operating model around the customers. The CDT end-to-end strategy is a crucial component of Fannie Mae's overall vision to be America's most valued housing partner and deliver on the five pillars in Single Family's strategic plan to:

1. Build unrivaled customer relationships
2. Dramatically simplify our customer experience
3. Increase certainty of sale, execution and process
4. Enhanced dynamic credit risk management capabilities
5. Develop an effective, adaptive organization

The CDT is not just a centralized team; it is a fundamentally new way of working! The CDT leader and team are empowered to cross functionally ensure value delivery to Fannie Mae's customers. Ultimately, the Single-Family organization will be organized to support the CDT model and equipped with lean management training and tools that will help us focus on core customer metrics.

**The Customer Delivery Team Leader** serves as the major point of contact for a defined group of high-value customers and is responsible for end-to-end customer experience and overall business performance. The CDT Leader will drive strategic relationship management with high-value clients while setting and executing an overarching account strategy for each customer. In this role, the CDT Leader will motivate and manage a customer delivery team to deliver customer service across all functions and processes (Capital Markets, Policy, Strategy, Analytics, Marketing, etc.).

#### **Key Job Functions & Duties**

- ***Set and execute customer account strategy***
  - Develop and articulate overarching strategy for each customer served by CDT linked to overall Fannie Mae strategy
  - Create and lead execution of annual plan using guidance from strategy, analytics and marketing
- ***Manage customer delivery team to deliver results to assigned customer group and improve process***
  - Coordinate daily activities to deliver value for customer and overall business performance
  - Lead daily huddles, track metrics (e.g. CSAT, profitability, etc.), and ensure that visual management tools are updated
  - Lead team problem-solving sessions, analyze metrics/data, and hypothesize root causes
  - Surface and oversee development of ideas to continuously improve processes and technology
  - Oversee coordination with functional leads and escalate issues as necessary
- ***Lead meaningful discussions with customers***
  - Along with relationship manager, act as major point of contact for customers
  - Solicit customer feedback and discuss ways to improve process, product and technology that benefits the customer
- ***Coach CDT members to improve performance***
  - Provide regular feedback and coaching to CDT members and identify opportunities to build specific skills
  - Oversee CDT members as they work to check team effectiveness and efficiency and provide clear and sensitive feedback

#### **Qualifications**

- Years of experience: 8-10 years of related experience
- Years of managerial experience: 3+ years
- Years of financial services experience at Fannie Mae or another financial institution: 2+ years
- Expertise in direct client management
- Experience leading large, matrix teams is strongly preferred
- Strong interest in coaching and empowering teams
- Bachelor's degree required; Master's degree preferred

#### **Specialized Skills and Knowledge**

- Experience in Financial Services, particularly demonstrated experience in the mortgage industry is preferred
- Experience managing to overall integrated business performance objectives (e.g., CSAT, revenue, cost)
- Demonstrated track record driving performance improvement opportunities
- Strong oral and written communication skills
- Strong track record of delivering high quality customer service within standardized guidelines (e.g. price and credit)
- Effectively manages teams and coaches employees to improve skills and performance

#### **Expected Leadership Behaviors**

- Takes personal accountability for quality of customer experience
- Has curiosity and excitement to learn Fannie Mae systems and processes across all major value streams
- Supports continuous improvement culture, seeking to make good processes better

- Drives new ideas and ways of working that benefit both the customer and Fannie Mae
- Collaborates across siloes (i.e., works well with functional leads)
- Challenges the organization to adopt breakthrough ideas and solutions
- Anticipates what our customers value and develops elegant solutions to delight them
- Seizes opportunities, striking a balance between accepting workable solutions and pushing for better alternatives
- Leads by example and gains the confidence and trust of others through logic, authenticity, and empathy
- Actively seeks new ways to develop yourself and serve others
- Steps up to address difficult issues, invite diverse perspectives, and say what needs to be said

Fannie Mae's **Compensation and Benefits** package is very competitive. It is designed to help employees meet varying needs throughout their careers and to reward employee's skills, expertise, and potential. A relocation assistance package is available as applicable.

Fannie Mae is an equal employment opportunity employer and considers qualified applicants for employment without regard to race, gender, age, color, religion, national origin, marital status, disability, sexual orientation, or any other protected factor.

As a condition of employment with Fannie Mae, any successful job applicant will be required to pass a pre-employment drug screen and to successfully complete a background investigation. Officer positions will also include a credit check as part of the background investigation process.

In summary, this is an amazing and rare opportunity to join Fannie Mae! The Customer Delivery Team Leader will be a catalyst in the Single Family Division's exciting Way of Working cultural initiative. He or she will drive real and fundamental change that is focused on the customer and lead the cross functional team of specialists.

This is an exceptional leadership opportunity, and therefore we are seeking particularly well-qualified candidates. Please direct all inquiries to Paul Conway at [pconway@conwaygreenwood.com](mailto:pconway@conwaygreenwood.com). All inquiries will be handled in a confidential manner. Preferred initial contact is an email with a short overview and a MS Word resume attached.

Thank you for your interest or for forwarding this to others that may have interest.

*About Conway & Greenwood, Inc.*

*Conway & Greenwood is a national executive search firm that specializes in retained search assignments for corporate clients to recruit senior level executives. The consulting firm has successful long-term relationships with many of the nation's leading financial and mortgage banking companies. Conway & Greenwood's commitment to professionalism and integrity produces great value for its clients. For additional information, please visit the website at [www.conwaygreenwood.com](http://www.conwaygreenwood.com).*

*Conway & Greenwood subscribes to a Code of Ethics and Professional Practice Guidelines that form the foundation of the practice.*

## Appendix C: Conway & Greenwood's agreement:



### RETAINER

The parties to this Retained Search Agreement ("Agreement") are the Client Company, \_\_\_\_\_, and its affiliates (collectively, "**Client**") and the Executive Search Consultant, **Conway & Greenwood, Inc.** ("**Conway & Greenwood**" or "**Firm**"). This Agreement consists of the Information Section below and the Terms and Conditions, which follow.

#### CONTRACT NOTICES:

##### Notices to the Firm:

Paul B. Conway, Jr., CMB  
Conway & Greenwood, Inc.  
766 East Whitaker Mill Road  
Raleigh, NC 27608

##### Notices to the Client:

##### Position Title:

Title of subject position:

##### Scope of Services:

The Firm will conduct a thorough and professional search process and will present qualified candidates who fit the requirements of the position(s) and the culture of your organization. An overview of Conway & Greenwood's proven search process as follows:

##### Defining the Scope of the Position

- Interview the client
- Confirm process and responsibilities
- Prepare/distribute Position Description

##### Identifying the Candidates

- Review proprietary database and contact potential candidates and key industry sources
- Identify range of candidates
- Begin initial interviews
- Prepare background summaries
- Submit initial slate of candidates to hiring manager

##### Building Momentum and Narrowing Candidate Base

- Obtain feedback from client
- Narrow candidate profile
- Identify additional candidates as applicable

##### Interviewing Candidates

- Facilitate the client interviews of candidates, participating as needed
- Receive feedback from client on each candidate
- Offer feedback to client from candidate
- Coordinate follow-up interviews with top candidate(s)
- Conduct reference checks as appropriate

##### Presenting the Offer

- Discuss potential offers with client prior to formatting
- Review Draft offer from client
- Present firm offer to candidate
- Negotiate offer/counteroffer process



#### Post Placement Follow Up

- Once offer is accepted, assist with resignation process and prepare candidate for counter offers
- Assist candidate and client with transition issues
- Once new executive on board, maintain contact with client and executive

#### Client's responsibility:

In addition to the other terms of this Agreement, the Client must remain responsive and engaged throughout the entire search process. This includes review of candidate profiles/resumes, setting timely dates for interviews, response to interviews, and the written offer of employment following the oral presentation by the Firm. The Client shall make every effort to ensure that its hiring manager, Human Resource officers, and other senior officers, understand their commitment to the process prior to executing this Agreement, in order to make the search process as professional and successful as possible.

#### Fees:

Conway & Greenwood agrees to undertake this search on an exclusive, retained basis. Our agreed upon fee for the Services shall be an amount equal to thirty three and one third percent (33.33%) of the total taxable compensation for the first twelve (12) months of employment, as generally determined by, but not limited to, the starting salary accepted plus any agreed upon estimate of bonus, commission, or other monetary incentive payments, whether paid or deferred. Based upon the current projected first year compensation of \$\_\_\_\_\_; the Firm's fee is estimated to be \$\_\_\_\_\_.

The Firm shall invoice its fee in three installments as follows. Installments shall be based on the estimated first year's compensation as noted above, and shall be due as follows: 33% (\$\_\_\_\_\_) due upon full execution of this Agreement; 33% (\$\_\_\_\_\_) due thirty (30) days from said execution date; and the balance due upon acceptance of the Client's offer by the Candidate, or upon the conclusion of this Agreement, not to exceed 180 days from the execution of this Agreement. Any fees collected in the first two installments will be adjusted as necessary against the final installment fee to equal thirty three and one third percent (33.33%) of the actual total compensation accepted by the Candidate hired. The Client agrees that payments are due upon receipt of invoice, and accrue interest at twelve percent (12%) from date of invoice if not received within thirty (30) days. Additionally, the Client shall be responsible for any fees, including and not limited to legal fees, incurred by the Firm to recover any past due balances hereunder.

The initial visit to the Client's offices to interview the hiring manager and other key managers shall be at the expense of the Firm. Although additional expense in excess of the Fee above is rare, if any additional expense or additional travel is required, then the Client will reimburse the Firm; but always with the Client's prior approval. When the Client has approved travel, the Client shall reimburse The Firm for actual, necessary and reasonable expenses for meals, lodging, airfare and transportation. Client will not pay for travel time and will not reimburse for airfare in excess of coach fare. If applicable, Client will reimburse any pre-approved direct out-of-pocket expenses, such as, credit and/or criminal background checks, but any additional expenses shall be prior approved by Client. Both the fee and the expenses are non-contingent upon the filling of the job opening.

## **Terms and Conditions:**

1. **Definitions.** "Candidate" means an individual whom The Firm presents to Client as a potential employee. "Services" means the management of the executive search process as outlined above to be provided by The Firm under this Agreement.
2. **Term of agreement.** This Agreement shall take effect when signed/executed by both parties. Such ratification may be evidenced by receipt of the original signed hard copy, electronic/emailed image, or by a facsimile. This Agreement will be concluded and any unpaid or adjusted balances of the Firm's fees will be due upon the earlier of (1) The position being filled by an individual who may or may not have been presented by the Firm; (2) The Client's notification to the Firm of the termination of the search assignment; (3) Expiration of a one hundred eighty (180) day period beginning with the ratification of this Agreement.
3. **Additional candidates.** In addition to this Agreement for the scope of services associated with the position and terms hereunder, if the Client, or any related business entity, hires any candidate presented by the Firm for any position within twelve (12) months of presentation, then the Client agrees to compensate the Firm at thirty three and one third percent (33.33%) of the individual's first year compensation (the total taxable compensation for the first twelve (12) months of employment, as determined by the starting salary accepted plus any agreed upon estimate of bonus, commission, or other monetary incentive payments, whether paid or deferred). This applies regardless of previous fees paid hereunder for other services/candidates, and survives the termination of this Agreement as noted below in "Effect of termination".
4. **Invoices.** Each invoice must include an invoice number, and sufficient detail to allow Client to determine the accuracy of the invoice. Invoices may be delivered to Client by either hard copy or electronically.
5. **Address for invoices.** All invoices shall be sent to the hiring manager unless otherwise specified by Client.
6. **Disputed invoices.** Client will notify The Firm of any disputed invoice within 30 days after receipt. The parties agree to attempt to resolve the disputed items within 30 days after the date of such notification, during which time neither party will have any obligation to pay any disputed amount.
7. **Replacement search.** If, within the first 12 months of a Candidate's employment with Client, a Candidate resigns his/her employment with Client or is terminated for cause, The Firm shall conduct an additional search with the objective to replace such Candidate. This additional search shall be performed at no charge to Client except for pre-approved direct out-of-pocket expenses incurred in connection with the search for replacement hereof in this paragraph. This replacement clause shall apply provided that the invoiced fees, as referenced herein, were received by the Firm on a timely basis and within the allowances as noted. This replacement search offer is made in the spirit of goodwill between the parties and the Client agrees that the hiring decision and its consequences rests fully with the Client.
8. **Non-solicitation.** The Firm warrants and agrees that it will not recruit from Client's employee base for a period of 12 months after the execution of the most recent search assignment. However, the Firm may contact the Client's employee base for referrals at any time.
9. **Additional warranties.** The Firm represents and warrants: (a) that all Services will be performed in a professional manner, by qualified personnel, and in accordance with the terms of this Agreement and applicable industry standards; (b) that in performing the Services, The Firm will make every effort to protect the Client's confidential or proprietary information; and (c) that The Firm will comply with all applicable city, state and federal laws, ordinances, rules and regulations, including but not limited to those which relate to employment, in performing Services pursuant to this Agreement.
10. **Equal opportunity and diversity.** The Firm will make every attempt to include female and minority candidates among those submitted to Client.
11. **Independent contractor.** It is agreed and understood that The Firm's relationship to Client is that of a consultant, and therefore, an independent contractor. Neither party shall be deemed to be a partner, agent, employee or joint venture partner of the other party. The Firm and its employees, agents and contractors shall not represent or imply that they are employees, agents, partners or joint venture partners of Client. All persons performing The Firm's obligations under this Agreement shall be considered to be solely the employees, contractors or agents of The Firm or its contractors, and The Firm and its contractors shall be responsible for ensuring there is payment of any and all salaries, wages, payroll taxes, insurance and other items payable to or on behalf of such personnel, and for maintaining worker's compensation insurance on such personnel. The Firm shall indemnify and hold Client harmless against any claims, costs or expenses that may arise out of any breach of this paragraph by The Firm or its contractors.
12. **Insurance.** The Firm agrees to maintain errors and omissions insurance in an amount not less than \$1 million per claim. The Firm also agrees to maintain commercial general liability insurance with a combined single limit of not less than \$1 million per occurrence and an aggregate limit of not less than \$1 million. In addition, The Firm agrees to maintain excess umbrella liability coverage in at least the amount of \$ 1 million. The insurance required by this paragraph shall be provided at The Firm's sole expense and shall

be maintained at all times while this Agreement is in effect and for such period thereafter as may be necessary to provide protection with respect to events occurring during the term of this Agreement. All insurance provided by The Firm will be primary and non-contributory to any insurance carried by Client. The limits of The Firm's insurance as stated in this paragraph will be considered as limiting the liability of The Firm under this Agreement. All insurance required to be maintained by The Firm shall be provided by U.S.-domiciled companies rated A X or better in the most current issue of A.M. Best's Rating Guide. Client shall at any time have the right to require The Firm to furnish certificates of insurance showing that the required insurance is in force and satisfies all requirements of this Agreement. Client hereby waives any claim against The Firm (whether founded upon the indemnification provisions contained in this Agreement or otherwise) to the extent such claim is satisfied by the proceeds of The Firm's insurance policies.

13. **Confidentiality.** The Firm acknowledges that, in connection with the performance of this Agreement or otherwise in the course of its dealings with Client, The Firm may receive or learn confidential, business, trade secret, proprietary or other like information. The Firm will use its best efforts to protect the confidential information and recognizes the trust placed in the Firm to manage such information appropriately.
14. **Dispute resolution.** In the event of any dispute arising out of or relating to this Agreement, the parties agree to attempt in good faith to resolve the dispute first by direct negotiation and then, if that is not successful, by mediation with a neutral third-party mediator acceptable to both parties. The parties will share mediation expenses equally. Any dispute arising out of or relating to this Agreement which is not settled by agreement of the parties within a reasonable time shall be settled exclusively in a binding arbitration by a single arbitrator. The location of any arbitration proceeding shall be in Wake County, North Carolina. The arbitration will be governed by the Federal Arbitration Act. The arbitrator will be selected and the arbitration conducted in accordance with the Commercial Arbitration Rules of the American Arbitration Association (AAA), except that the provisions of this Agreement will control over the AAA rules. The parties will share equally in the fees and expenses of the arbitrator and the cost of the facilities used for the arbitration hearing, but will otherwise bear their respective costs incurred in connection with the arbitration. Depositions will not be allowed, but information may be exchanged by other means. The parties agree to use their best efforts to ensure that the arbitrator is selected promptly and that the arbitration hearing is conducted no later than 3 months after the arbitrator is selected. The arbitrator must decide the dispute in accordance with the substantive law which would govern the dispute had it been litigated in court. This requirement does not, however, mean that the

award is eligible for review by a court for errors of law or fact. Following the arbitration hearing, the arbitrator shall issue an award and a separate written decision, which summarizes the reasoning behind the award and the legal basis for the award. The arbitrator may not require one party to pay another party's costs, fees, attorney's fees or expenses. The award of the arbitrator will be binding on each party. Judgment upon the award may be entered in any federal district court.

15. **Non-waiver.** No term or provision of this Agreement shall be deemed waived and no breach shall be deemed excused unless such waiver or consent shall be in writing and signed by the party claimed to have waived or consented. No consent by any party to, or waiver of, a breach by the other shall constitute a consent to, waiver of, or excuse for any different or subsequent breach.
16. **Partial invalidity.** If any provision of this Agreement or any Addendum is held to be unenforceable, the remaining provisions shall continue in full force and effect. The parties shall in good faith negotiate a mutually acceptable and enforceable substitute for the unenforceable provision, which substitute shall be as consistent as possible with the original intent of the parties.
17. **Effect of termination.** Termination of this Agreement shall not relieve either party of any previously accrued obligations or of any obligations, which by their nature are intended to survive termination. Obligations, which survive, shall include, but not be limited to, obligations in connection with non-solicitation, warranties, and additional candidates.
18. **Assignment.** Neither party's rights nor obligations under this Agreement (except the right to receive money) shall be assigned or delegated without the written consent of the other party, except that either party may without such consent assign all of its rights and delegate all of its obligations under this Agreement to an entity: (a) which such party owns or controls; (b) which is owned or controlled by such party; or (c) which is under common ownership or control with such party. In addition, Client may without The Firm's consent assign its rights and delegate its obligations under this Agreement to an entity to which Client transfers substantially all of its assets relating to this Agreement. Any consent required by this paragraph shall not be unreasonably withheld, conditioned or delayed. In the case of any assignment permitted hereunder without the other party's consent, the assignor shall promptly notify the non-assigning party in writing of the assignment and shall include in its notice a statement of the facts that permit assignment without consent. Except that as a matter of industry practice some services performed under the Firm's Scope of Services are occasionally shared with third party companies, and the Firm may elect to employ the services of associated companies to most expeditiously meet the needs of the Client.

19. **Successors and assigns.** This Agreement and each Addendum shall inure to the benefit of and be binding upon the respective successors and assigns, if any, of the parties. Nothing in this paragraph shall be construed to permit any attempted assignment, which would be unauthorized pursuant to any other provision of this Agreement.
20. **Construction.** The paragraph headings in this Agreement are for reference purposes only and shall not be deemed a part of this Agreement. The wording used in this Agreement is the wording chosen by the parties to express their mutual intent, and no rule of strict construction shall apply against either party.
21. **Entire agreement; amendment.** This Agreement constitutes the entire agreement between the parties with respect to the Services. This Agreement may be altered only by a written amendment identified as such and signed by authorized personnel of both parties. All such amendments to this Agreement shall be binding on both parties despite any lack of consideration.
22. **Governing law.** This Agreement shall be governed by the laws of the state of North Carolina, without reference to conflict of law principles. The parties agree that any dispute arising out of this Agreement shall be adjudicated in either the state or federal courts in North Carolina and in no other forum. For that purpose, Client hereby submits to the jurisdiction of the state and federal courts of North Carolina. Client also agrees that both the federal and state courts in Wake County, North Carolina are a convenient forum and agree not to raise as a defense that such courts are not a convenient forum. Client further agrees to accept service of process out of any of the before mentioned courts in any such dispute by registered or certified mail addressed to Client at the address as noted herein on page one.
23. **Notices.** Written notices shall be delivered by hand, by overnight courier, by facsimile, or by certified or registered mail, postage prepaid, return receipt requested, and shall be effective upon receipt by the transmitting party of machine confirmation of successful transmission of a facsimile to the correct facsimile number, or on the date of actual delivery when the written notice is not sent by facsimile. All notices shall be directed as indicated under the "Contract Notices" heading in the Information Section unless written notice has been given providing different directions.

THE PARTIES HAVE READ THIS AGREEMENT, UNDERSTAND IT, AND BY SIGNING BELOW AGREE TO BE BOUND BY IT. EACH PARTY REPRESENTS THAT THE INDIVIDUAL SIGNING ON ITS BEHALF HAS FULL AUTHORITY TO BIND SUCH PARTY.

**For the CLIENT:**

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\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date

**For the FIRM:**

**Conway & Greenwood, Inc.**

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Name

\_\_\_\_\_  
Title

\_\_\_\_\_  
Date