



RETAINED DIVISION

FINANCIAL SERVICES • INSURANCE & FINTECH

OUR SERVICE



FULLY RETAINED EXECUTIVE SEARCH

A dedicated, fully retained engagement model — senior-level focus and full team support from kickoff to placement.



SPEED & FRESH MARKET ACCESS

Every search launches from scratch — full access to today's talent market, not a recycled database.



SENIOR-LEVEL PARTNERSHIP

Direct access to a dedicated search director and division support throughout the full process.



BUILT FOR CRITICAL ROLES

Purpose-built for leadership hires where the cost of a wrong fit is highest.

OUR EXPERTISE

We partner with insurance and fintech companies to identify and secure transformational leaders.



COMPANY TYPE

- Insurance Carriers & MGAs
- FinTech Companies
- Financial Services Platforms



LEVEL

- Executive / C-Suite
- Vice President
- Director



FUNCTIONS

Representative titles we commonly work on — not an exhaustive list

- | | |
|------------------------------|--------------------------------------|
| • CEO / President | • Chief Technology & Product Officer |
| • Chief Operating Officer | • Chief Marketing Officer |
| • Chief Financial Officer | • Chief Claims Officer |
| • Chief Underwriting Officer | • Chief Transformation Officer |
| • Chief Distribution Officer | • VP of Sales & Business Development |
| • VP of Operations | • VP / SVP of Distribution |

EXPERIENCE



SEARCH PROS

50 years of successful search experience



UNMATCHED REACH

2,500+ placements over the last two decades

HGI
RETAINED DIVISION



INDUSTRY CREDIBILITY

Led by professionals with real operating experience in the industries we serve



DEEPLY ROOTED RELATIONSHIPS

80% repeat client rate across Harrison Group's search practices



MARK PETERSON

Search Director – Retained Division



MEET OUR PRACTICE LEAD

Mark Peterson brings more than 30 years of life insurance distribution leadership to Harrison Group's Retained Division. His path began in foundational roles — including insurance operations, wholesaling, and work as a licensed agent — giving him a ground-level understanding of distribution before he advanced into national sales leadership at Sun Life Financial and Aviva USA. He joined AIG in 2012, where he rebuilt the company's life brokerage distribution business and rose to Executive Vice President & Chief Distribution Officer — a role he held across AIG and its successor, Corebridge Financial, overseeing all seven of the company's distribution channels. Most recently, he served as Vice President & Chief Distribution Officer at AuguStar Life.

Mark has sat in the seat he now recruits for — building, hiring, and leading distribution executives throughout his own career — and brings that firsthand perspective to every search.

30+

Years in Life Insurance
Distribution Leadership

20+

Years as EVP & Chief
Distribution Officer

7

Distribution Channels
Led Company-Wide



JOSH SCHMITT

Practice Director – Retained Division



MEET OUR PRACTICE DIRECTOR

Josh has spent the last six years building one of Harrison Group's most successful executive search practices, completing 200+ searches across his career with the firm. His placements consistently outperform industry norms for long-term success — 92% remain with their new company after two years.

A 5-time Pacesetter Award winner and top 5% producer nationally within the MRI Network, Josh brings that same rigor, market insight, and focus on long-term fit to lead Harrison Group's Retained Division alongside Mark Peterson.

200+

Searches
Completed

92%

Two-Year Placement
Retention Rate

5X

Pacesetter
Award Winner

OUR SEARCH PROCESS

Harrison Group's Retained Division runs a confidential, senior-level search process built to identify and secure executive talent that isn't actively looking.

- 1 Discovery & Search Thesis**
Business context, leadership profile, must-haves, compensation, and success measures.
- 2 Confidential Market Mapping**
Confidential mapping of active and passive executive talent across insurance and fintech.
- 3 Direct, Discreet Engagement**
Direct, discreet approach to identified executives — not job postings or broad outreach.
- 4 Assessment & Calibration**
Rigorous assessment against the leadership profile, calibrated with you in real time.
- 5 Finalist Presentation & Interviews**
A curated slate of vetted finalists; we manage interview logistics and feedback.
- 6 Reference & Offer Management**
In-depth reference checks and hands-on offer strategy through to signed offer.
- 7 Onboarding & Long-Term Follow-Up**
Smooth onboarding support, plus year-one follow-up with both client and executive.

EARLY DELIVERABLES

A confirmed search thesis, an initial target-company map, and calibrated compensation and market feedback — typically within the first two weeks.

SUPPORT TEAM

Our Support team is an integral part of the Retained Division. They build our database, ensure our search directors have access to top talent, and handle the behind-the-scenes operations that allow the search team to focus on building strong relationships with clients and candidates.



TYLER TURNER

Senior Director of
Business Strategy



THERESA JONES

VP of Operations

LEADERSHIP



Mike Brown

Managing Director

Before becoming Managing Director, Mike spent 15 years personally running Harrison Group's Financial Services recruiting desk, building the relationships and market knowledge that now anchor the firm's move into retained executive search. With over 25 years in recruiting overall, Mike has mentored generations of search professionals and continues to back the Retained Division with the same hands-on financial services expertise that built his own track record.