



RETAINED DIVISION

FINANCIAL SERVICES

INSURANCE & FINTECH

HARRISON GROUP, INC.

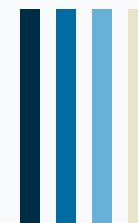
RETAINED EXECUTIVE SEARCH

EXECUTIVE LEADERSHIP

FOR INSURANCE & FINTECH

50 YEARS

OF SUCCESSFUL SEARCH



A focused leadership search partnership for high-impact roles.

OUR SERVICE



RETAINED DIVISION

FULLY RETAINED EXECUTIVE SEARCH

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

01 SPEED & FRESH MARKET ACCESS

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

02 SENIOR-LEVEL PARTNERSHIP

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

03 BUILT FOR CRITICAL ROLES

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

OUR EXPERTISE



RETAINED DIVISION

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

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

Representative titles we commonly work on. This is not an exhaustive list.

EXPERIENCE



RETAINED DIVISION

50 YEARS

SEARCH PROS

50 years of successful search experience

2,500+

UNMATCHED REACH

2,500+ placements over the last two decades

80%

DEEPLY ROOTED RELATIONSHIPS

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

INSIDER PERSPECTIVE

INDUSTRY CREDIBILITY

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

OUR SEARCH PROCESS



RETAINED DIVISION

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

01	Discovery & Search Thesis	Business context, leadership profile, must-haves, compensation, and success measures.
02	Confidential Market Mapping	Confidential mapping of active and passive executive talent across insurance and fintech.
03	Direct, Discreet Engagement	Direct, discreet approach to identified executives, without job postings or broad outreach.
04	Assessment & Calibration	Rigorous assessment against the leadership profile, calibrated with you in real time.
05	Finalist Presentation & Interviews	A curated slate of vetted finalists. We manage interview logistics and feedback.
06	Reference & Offer Management	In-depth reference checks and hands-on offer strategy through to signed offer.
07	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.

MEET OUR PRACTICE LEAD



MARK PETERSON

Search Director – Retained Division



[Mark Peterson on LinkedIn](#)

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. He 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**

MEET OUR PRACTICE DIRECTOR



JOSH SCHMITT

Practice Director – Retained Division



[Josh Schmitt on LinkedIn](#)

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, with 92% remaining 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.

He combines hands-on search execution with real-time market calibration, keeping each engagement focused on the leadership profile and long-term placement success.

200+

**Searches
Completed**

92%

**Two-Year Placement
Retention Rate**

5X

**Pacesetter
Award Winner**

SUPPORT TEAM



RETAINED DIVISION

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



RETAINED DIVISION



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.