



"Carrie is known for her insight around personal dynamics as well as her understanding of the wider organisational and market forces impacting executives."



Carrie's coaching and board assessment work is a mixture of empathetic insight, a keen interest in clients' success, and practical knowledge gained from working across a wide range of sectors and organisations.

### Experience

Born and educated in America, Carrie has become known in the UK and abroad for her ability to help executive, senior and high potential clients increase their leadership confidence and resilience in the context of personal, organisational and market transition.

Carrie brings to her coaching and board assessment work experience from a career that has spanned banking, investment banking, bank stock research and management consulting, including:

- **CoombsMartin Executive Coaching:** Partner and Founder
- **Praesta Partners:** Business Coach
- **KPMG Strategic Due Diligence Unit:** Retained Advisor, Transaction Services
- **Eden McCallum:** Partner peripatetic consultant pool
- **Gemini Consulting/ The MAC Group:** Principal, Global Financial Services Strategy
- **Solomon Brothers Research:** Associate, global research for banks and market trends
- **Morgan Stanley Fixed Income:** Associate
- **Lloyds Bank International, Corporate Banking:** AVP

### Recent Assignments

- **Board Assessment, IT Services:** For the client's first external Board Evaluation, the Chair and SID wished to address a challenging dynamic in the Board. The ExCo wanted to use NEDs and the Board more fully, and NEDs wished to add more value to the organisation. Our work addressed the board dynamic and resulted in a plan for broader Board and Director development.
- **ExCo Team, European Asset Manager:** Team coaching the CEO and ExCo through a second shift in strategy in light of difficult market conditions.
- **Chairman, Portfolio:** Client moved from CEO of a PE-owned FS 'carve out' to a portfolio career. Coaching provided time to think through the search process and multiple board options, and a framework to ensure the new portfolio fit the client's personal values and work-life balance objectives.
- **CEO, EMEA, Hedge Fund:** provided a strategic sounding board through the establishment of the London-based EMEA headquarters of a highly successful US fund of funds.
- **MD, Wealth Management Firm:** helped a key business manager to step up to the Executive Board and widen his leadership style to co-lead the business through a shift of its operating model.

### Education, professional positions

- UCLA (Anderson), MBA, Finance
- Wellesley College, BA, Economics
- Dartmouth College, Ivy League Colleges Exchange Program
- The School of Coaching: Accreditation in Executive Coaching
- The Tavistock Institute: Certificate in Dynamics at Board Level
- AOEC: Certificate in Team Coaching
- Trustee, Ex-Pat Foundation 2015-present
- Member: Advisory Board, Hamilton-Brown Business Graphics, 2015-present
- Member: Advisory Board, Westleton Drake LLP, 2014-15

### Selected Client Testimonials

"An excellent Board Evaluation process and outcome. I feel certain the Board as a whole will have benefited greatly from your good work."  
Executive Board Member, FTSE 250 Board

"Carrie gets straight to the heart of the matter, empathetically but intelligently, and enabled me to find my own plan through whatever issue or challenge the ExCo was dealing with."  
CEO, International Asset Manager

"Carrie's coaching literally helped me find my voice as a senior woman at the leadership table. The coaching helped my confidence grow and my thought process change."  
MD, Corporate Bank