



Northern New England Wealth Management firm is currently seeking a Chief People Officer to lead our human resources strategy, foster a positive and inclusive organizational culture, and drive employee engagement across the firm.

COMPANY OVERVIEW:

R.M. Davis is a leading provider of wealth management and investment advisory services to clients in more than forty states and five countries. The firm has approximately \$7.2 billion in assets under management, and sixty-seven employees across two New England offices (Portland, ME and Portsmouth, NH). We are dedicated to delivering exceptional service for our clients as well as constantly challenging our technology and operating framework to ensure the effectiveness of our value chain. We are committed to maintaining the highest level of information security for our company and our clients.

Accountabilities:

The Chief People Officer will work closely and collaboratively with members of senior management to support business objectives while ensuring the development of our most asset – our people. Specific accountabilities include:

- Develop and implement effective strategies for attracting, recruiting, and retaining top talent within our industry.
- Oversee and/or participate in the recruitment and onboarding process, ensuring proper alignment with the organization's strategic goals and diversity initiatives.
- Identify opportunities for organizational development, and plan, communicate and implement organizational development strategies.
- Implement best practices for onboarding, training, and professional development in support of employee growth and career progression.
- Design and implement performance management processes that align with the firm's strategic objectives and encourage continuous improvement.
- Collaborate with senior leaders to establish competitive compensation and benefits structures that attract and retain key talent.
- Develop, implement, and oversee employment policies and procedures, including updates of the employee policy manual.
- Serve as a trusted advisor and mediator in all employee relations matters, fostering positive relationships and resolving conflicts, as needed.
- Provide leadership development opportunities and coaching for managers to build a strong leadership pipeline.
- Partner with senior leaders to develop and execute strategic workforce planning initiatives.

- Champion a positive and inclusive workplace culture that reflects the firm's values and promotes collaboration, innovation, and high performance.
- Ensure compliance with all employment laws, regulations and internal policies related to human resources. Attend relevant seminars, conferences, and meetings to stay up to date and informed.
- Implement and maintain Human Resource Information Systems (HRIS) that support efficient data management and reporting.
- Oversee the benefit contract renewal process for all firm-provided benefits.
- Serve on or chair applicable committees, including the Talent Development Human Capital Committee, Compensation Committee, and Profit-Sharing Plan Committee.
- Provide assistance with HR-related work in support of the budget development, year-end processes, and the annual financial audit. May also complete certain mandatory government surveys or other surveys for which the firm chooses to participate.

The Chief People Officer will have the following minimum qualifications:

- A bachelor's degree in Human Resources, Business Administration, or a related field is required. In addition, relevant certifications (i.e., SHRM-CP, SPHR) are preferred.
- Minimum of 7-10 years of prior work experience in a senior human resources leadership role, preferably within the financial services, wealth management, or equivalent professional services industry.
- An extensive and current working knowledge of organizational development, employment law, and all human resource functions and best practices is required.
- Prior experience with strategic and human capital planning, as well as evaluating, developing and implementing compensation systems, policies and practices.
- Effective communication and interpersonal skills, with the ability to influence and collaborate across all levels of the organization. Ability to build buy-in and engagement among and across various constituencies.
- Ability to lead and execute change management initiatives, including developing communication strategies and facilitating employee trainings, to ensure smooth transitions during organizational transformations.
- Must be able to make sound decisions and exercise independent judgment and discretion regarding various aspects of the business operation.
- Must have high integrity and ethical standards, effective conflict resolution skills, and ability to maintain confidentiality with highly sensitive company information.
- The ability to thrive in a fast-paced environment while managing tight timeframes and juggling multiple and competing priorities.

BENEFITS:

- Competitive compensation and annual bonus opportunity
- 401k plan with employer contributions
- 100% company-paid employee health insurance
- Generous paid time off, including parental leave
- Education reimbursement
- Company paid, covered parking
- Short and long-term disability insurance
- Hybrid work opportunities
- Professional downtown office setting
- Collaborative work culture

R.M. Davis is an equal opportunity employer that values diversity. We do not discriminate on the basis of race, religion, color, national origin, gender, sexual orientation, age, marital status, veteran status, or disability status.

If you are a highly motivated individual with a proven track record of driving talent and retention strategy, and fostering employee engagement within a firm, we encourage you to apply for the Chief People Officer position at our firm.

Please submit a cover letter, resume and additional relevant information to Denise Vigneault, Managing Director – Human Resources, at dvigneault@rmdavis.com.

This position will report to the President.

FLSA Status: Exempt

February 2025