



## PREPARING FOR BUSINESS CONTINUITY

### Executive Talent Solutions to Support Wealth Management and Trust Services

#### Introduce Peace of Mind for Your High-Net-Worth Clients

As a professional serving high-net-worth clients within the wealth and asset management sectors, you understand the importance of not only growing wealth but also protecting legacies. Many of your clients own and run operating companies, which pose unique challenges in the event of their death or incapacity. At GlassRatner, we specialize in providing interim and fractional executive management solutions to ensure these businesses continue to operate smoothly, even during difficult transitions.

#### Why Proactive Planning is Essential

Effective succession and continuity planning are crucial for safeguarding the future of your clients' businesses. By engaging in strategic discussions now, you can help them prepare for unforeseen circumstances.

Our firm offers the following tailored services:



**Immediate Access to Top Talent:** In the event of a client's death or incapacity, we can swiftly identify and secure experienced interim or fractional executives who can step in and manage the company. This ensures minimal disruption to operations and provides reassurance to stakeholders and beneficiaries.



**Customized Executive Solutions:** We source qualified executives across all industries throughout Canada, the U.S. and globally. Our extensive network and deep industry expertise allow us to match the right talent with the specific needs of each client's business.



**Flexible Engagement Models:** Our arrangements can be triggered seamlessly upon the predefined circumstances your clients choose, offering peace of mind that their companies will remain under capable leadership.

#### Foster Client Loyalty and Trust

By proactively discussing the importance of business continuity planning, you not only demonstrate your commitment to your clients' long-term success but also strengthen your relationship with them. Engaging GlassRatner as a trusted partner in this process positions you as a valuable resource that goes beyond traditional banking, wealth management or trust services.

## Your Partner in Interim and Fractional Executive Solutions

Behind every decision and transaction, there are human and emotional factors at play.

While the success for our client's businesses is measured by financial performance, it's ultimately their people who drive and manage operations to deliver their vision. At GlassRatner we understand that behind every business decision and transaction, human factors are at play.

As executive search professionals and human capital advisors focused on interim and fractional solutions, we engage where strategy meets talent to connect high-impact executives to growing companies. We see ourselves not just as transactional partners but as an extension of our clients' executive teams – ambassadors of their employer brands.

Our purpose drives everything we do. We take the time to understand our client's business, allowing us to identify and attract the right talent to fit their unique needs. We work closely with clients to build strong leadership teams and support the career journeys of an engaged candidate community.

GlassRatner's track record of success is built on our bespoke approach. While we follow a rigorous and methodical process, we remain flexible, customizing each search to align with your specific requirements. For interim management, where speed and responsiveness are crucial, our timeline is measured in "days and weeks", balancing speed with quality to ensure optimal results. When clients partner with us, they gain access to interim and fractional executives who can step in quickly and deliver value, helping their organization thrive in any situation.

## More About Us

GlassRatner is a Canadian advisory firm that provides practical solutions to complex financial and operating problems. We have a reputation for responsiveness and a track record of helping our clients achieve their objectives and overcome challenges. Founded in 1979, GlassRatner was established as an insolvency and restructuring business. Today, we continue to grow by fostering an unparalleled collaborative approach, seamlessly providing services across the areas of restructuring, financial and human capital consulting, executive search and interim management, M&A, and corporate finance. With offices in Toronto, Calgary, Edmonton, and Vancouver, and as the exclusive Canadian partner of IIC Partners – one of the world's top 10 alliances of executive search firms, with over 450 expert consultants across 40 global offices – GlassRatner is positioned to provide your clients with the security and stability they deserve across Canada and beyond.

## Contact Us



**Ian Brenner**

Senior Managing Director

[ibrenner@glassratner.com](mailto:ibrenner@glassratner.com)

*Co-leads of Interim & Fractional Practice*



**Christian Buhagiar**

Principal

[cbuhagiar@glassratner.com](mailto:cbuhagiar@glassratner.com)



**Steve Rosen**

Partner

[srosen@brileyfin.com](mailto:srosen@brileyfin.com)