



EXECUTIVE FORUM '18

DEBATE. INCUBATE. ACCELERATE.

Todd Thomson

Dynasty Financial Partners
Co-Founder and Chairman

Mr. Thomson is an accomplished operating executive, serving as Citigroup CFO for 5 years and as CEO of Citigroup's \$10 Billion (revenues) Global Wealth Management division. Mr. Thomson also is a leading global practitioner and advisor on M&A and business strategy, having led the acquisition and strategy efforts over many years for Citigroup and GE Capital, as well as serving as advisor to dozens of Fortune 500 firms while at Bain & Co., Booz Allen Hamilton, and Barents Group.

Presently, Mr. Thomson is co-founder and Chairman of Dynasty Financial Partners, the leading investment and technology platform for sophisticated independent advisors.

He is also CEO of Headwaters Capital, where he structured and co-led the \$155 Million recapitalization of West Coast Bancorp (WCBO), which closed in November 2009. HWC also is a founder and investor in Cordia Bank, which acquired a majority interest in Bank of Virginia in 2010, and was sold to First Citizens Bank in 2016. HWC is a founding investor in Embody Fitness Gourmet, health and performance-oriented cafes.

From 1998 through 2007, Mr. Thomson served in top management positions at Citigroup, including CFO of the company and CEO of the Global Wealth Management division. Throughout his 9-year tenure at Citigroup, Mr. Thomson served as a member of the most senior operating committees of the firm, the Citigroup Business Heads and Management Committees. He also was Vice-Chairman and a Director of Citibank, N.A.

Previously, Mr. Thomson was SVP Strategy and Acquisitions of GE Capital, Partner at Barents Group, and Manager at Bain & Co.

In addition to serving as Chairman of the Board of Dynasty Financial Partners, Mr. Thomson is Lead Director of the Board of Cyren, LTD. He is a member of the Economic Club of New York and is Chairman of the Wharton Leadership Advisory Board. He is also a past member of the Board of World Resources Institute and the Board of Trustees of Davidson College. Mr. Thomson received his M.B.A. with distinction, from the Wharton School of Business and his B.A. in Economics from Davidson College.