Career Sherpa

Strategic Navigation, Positioning & Advisory

A new advisory service from Ward & Dean, giving commercial banking executives the tools to intelligently navigate the climb.

The best bankers don't move alone

You originate the loans. You manage the clients.

You underwrite the credit. You run the team.

But nobody hands you a map for your own career.

That is what this is.

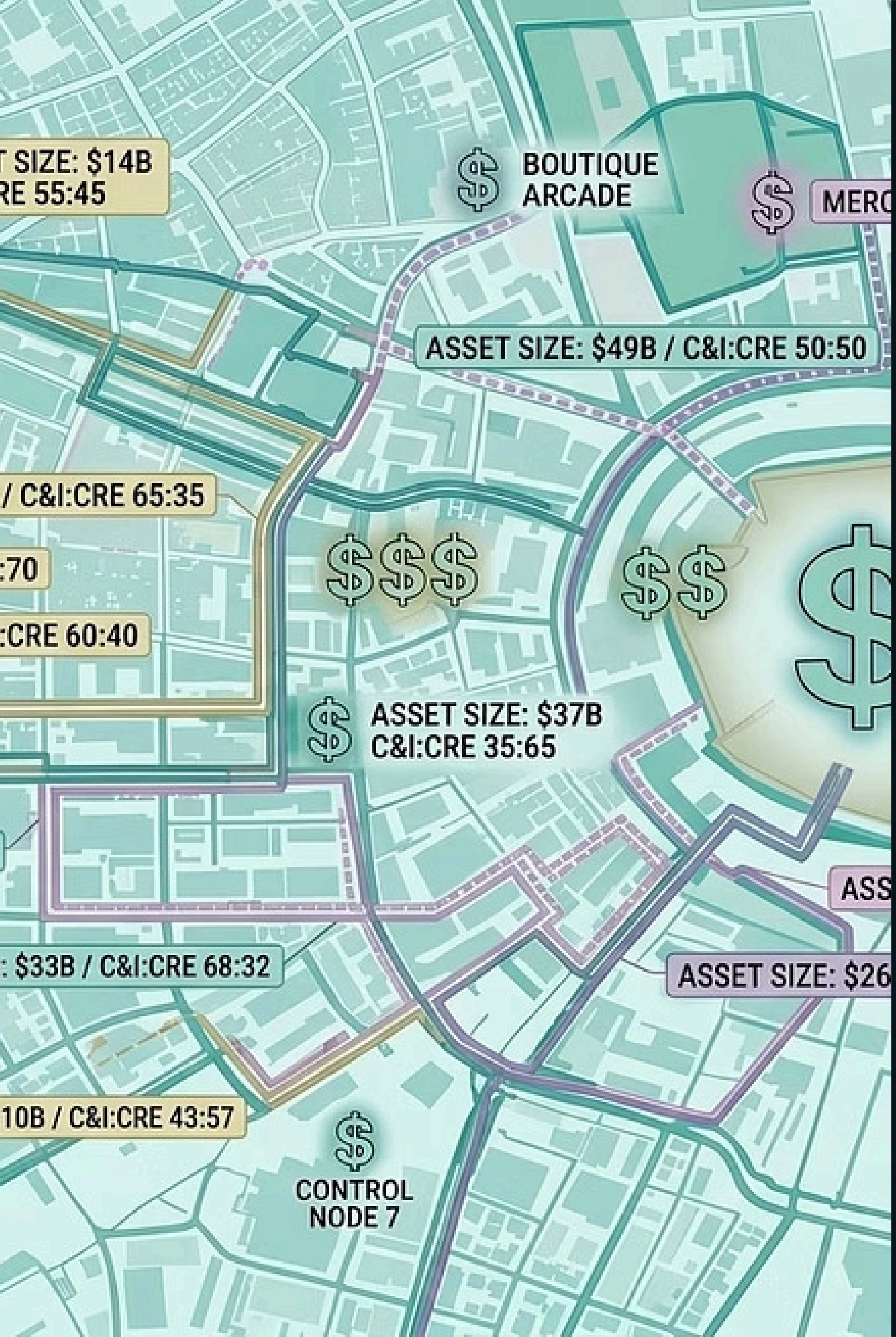
A guide built entirely for you.

What your recruiter won't tell you

⚠ A recruiter's reach stops at the banks they hold a contract with. Skip the contract, skip the bank.

That cuts out nearly every bank over $100B in assets, and a lot of the large regionals too. Those shops hire 100% in-house. No agencies, ever.

About 99.9% of recruiters quietly skip them, because no contract means no paycheck.



Career Sherpa opens the whole market

You pay me

So I work for you. That means I can look everywhere.

Any bank

Any fintech. Any financial services firm. Any size, anywhere.

The whole market

Open for exploration. No contracts limiting the search.

Five stages, one climb

5. The Retainer

Stay ready year-round.

4. The Summit

I run the full campaign.

3. The Ascent

A guided 90-day move.

2. Base Camp

The assets that make you findable and credible.

1. The Compass

A single session to get your bearings.

Start here: The Compass

90-minute session, one on one

Where you stand, and what you are realistically worth.

Your smartest next move

Mapped step by step.

Credited in full

Toward any package you book within 30 days.

$400. The first step costs you nothing if you keep climbing.

Base Camp: get the assets right

Executive Summary

The two-page document that immediately communicates your value and holds attention (keep scrolling to see example, it's very cool)

LinkedIn Rebuilt

The headline, the About, and the keywords that get you found. (This is far more important than most bankers realize)

Compass Session

A strategy session to set the direction. (I walk you through your next, most impactful steps, with the right tools)

$1500. Everything you need to be found, credible, and ready.

The Ascent: a guided 90-day move

01

Market Map- Full Target Build

Every bank that has a current need for your specific skills, with deep market intelligence behind it. Plus the actual hiring managers, their contacts, and a ready-to-send intro email for each. (scroll to see the example, this tool has serious horsepower)

02

Skills Gap Analysis

A read on how your skills stack up against the market, and how to close any gap.

03

Salary Survey

So you know your number and how to defend it.

04

Coaching Every Other Week

Three months of guided support through the full move.

$5000. The absolute confidence of having all the tools needed for an unfair competitive advantage in your search

The Summit: I run the campaign

→ **I make the introductions myself**

You gain the leverage of my reputation and network. I tie your talents directly back to the bank's needs at every touchpoint.

→ **I run the full search**

All logistics, all tracking, every roadblock. I handle it all. You focus on your job.

→ **I am at the table**

For the offer, the negotiation, and the close. We partner to get you the best deal possible from Day One.

→ **I am the link between you and each Hiring Executive.**

No HR queue. No indefinite silences. Strategy + Tactics

$9,500 + % success fee. The success fee is a small percentage of negotiated comp, and it's waived if the financial institution that hires you is already paying me. Percentage is calculated based upon seniority.

The Retainer: stay ready

Not moving yet, but want someone watching the market for you?

Quarterly Sync

A strategy call every quarter to keep your positioning sharp.

First Call

The first call when anything aligned with your goals is opening in your target markets.

Always-On Intelligence

An always-on read of where the market is going, and how to align yourself accordingly.

Discreet Introductions

I expand your professional network by connecting you with high-performing peers and market executives that you should know.

$1200/year to keep yourself at the top of the market and the top of my mind

Or just the piece you need

Buy any single service on its own. It credits toward a package if you upgrade later.

Market Map (full target build) $2500

Every target bank, hiring manager, and contact path. Built with deep market intel and including a ready-to-send intro email for each hiring executive

LinkedIn Optimization $350

Headline, About, and keywords rebuilt. Raise the market's awareness of you.

Executive Summary $650

Two bespoke pages that immediately set you apart from any other candidate. Calls out your value in indisputable metrics, nested inside a polished aesthetic.

Salary Survey $350

Know your number and how to defend it.

Competitive Skills Analysis $500

Know your advantages and how to double-down on them. Understand your gaps vs the market and how to close them.

Confidential Market Test $450

A discreet read without going to market. Counteroffer audit included.

Compass Session $400

90 minute confidential strategy discussion with at least one key idea to implement tomorrow.

Reference Strategy & Prep $300

Pick the right references, prep them, sequence who gets called when

Quarterly market brief $240/year

A written read on the commercial banking industry: who's hiring, where comp is moving, potential market disruptions. You know what I know.

Offer negotiation / deal-closing $1000

Bring me in to audit your options and give you the assurance you pick the right role for the right comp

90-day landing plan $600

Coaching during your critical first three months in your new role

Personal brand content (per scope)

Four relevant Linkedin posts per month so you stay visible and gain market cache

See the work: the Executive Summary

The two-pages that grab attention and lock interest. Metrics-first, polished aesthetic, built to get you a meeting.

Professional-grade headshot →

Performance metrics call-outs →

Achievement call-outs →

Education & Professional certifications →

Easy-to-read career progression →

← Compelling professional summary

← Notable accomplishments brief

← Awards & Recognitions

← Areas of expertise

← Core competencies

See the work: the Market Map

Every target bank, with the hiring manager, the contact path, the market intel, and a drafted intro email you can send. Sample is from a team lift-out. Names blurred for privacy.

MARKET MAP · sample · team lift · Ward & Dean — candidate names & employer blurred

Tier	Target bank	Why this team fits ★	Outreach angle ★
T1 Local / growth	**Poppy Bank**	Poppy is mid-build on a California branch push, a dozen new locations targeted by end of 2026, and CRE has always been its engine. A turnkey unit doing $100M in annual loans plus $50M in low-cost municipal deposits drops straight onto that growth plan. The team lives in Roseville, where Poppy's corporate office and CBO Michael Finn already sit, so there's zero commute friction and likely overlapping COIs. [illegible] has built a commercial office from scratch before, exactly the muscle a fast-expanding bank needs. [illegible] SBA 504/7A book adds fee income and government-guaranteed paper.	Lead with the deposit math: $50M in municipal deposits funds the loan growth Poppy is already paying up for. Acheckzai is the decision-maker; one warm intro, framed as a self-funding production pod that lands in his backyard.
T1 Local / growth	**Five Star Bank**	Five Star runs a concentrated CRE and commercial model and has grown faster than any bank in the metro, so producers are the bottleneck and the appetite is already there. [illegible] and [illegible] $100M CRE-weighted book is the exact paper Five Star underwrites, and the team's [illegible] pedigree maps cleanly onto Five Star's relationship-first credit culture. Beckwith, named Sacramentan of the Year in November 2025, has spent the cycle hiring producers ahead of the curve. The $50M municipal deposit book matters more here than almost anywhere: Five Star's growth has been deposit-constrained, and low-cost public funds ease that.	Frame it as deposits plus production in one hire. Five Star's story is loan growth chasing funding; this team brings both sides. Beckwith first, Quinn as the operating sponsor.
T3 Large regional	**Columbia Bank**	Columbia closed the Pacific Premier acquisition in 2025 on top of the earlier Umpqua merger, and back-to-back integrations always shake loose bankers and create coverage gaps a finished team can fill. At $70B it's just under the cap and has a deep Sacramento footprint, so a CRE-and-C&I pod with municipal deposits slots into existing infrastructure. Nixon built Umpqua's middle-market division and co-leads the combined bank, so commercial production is his lineage. The risk is out-of-region decisioning and integration noise, which is why this sits in T3.	Position the team as continuity for clients unsettled by two mergers. The wedge is integration fatigue: producers and customers both looking for a steadier home. Reach the California commercial lead under Nixon rather than the Tacoma C-suite.

Every target bank gets this depth of fit analysis and a tailored outreach plan. Candidate identity is blurred here; your real map names the team. One tier of a full map shown.

How I work

My commitment to you

I won't shop you around. And I won't tell you what you want to hear if I think you are about to make a mistake.

One straight answer to the obvious question

I never take a fee from both sides of the same hire. If a bank that hires you already pays me, your fee comes off.

The coaching and the assets are yours, clean.

Let's talk about your goals and the path to reach them.

If any of this fits where you are, or you just have questions, reach out. No script, and no obligation.