

GEORGE W. BARTLETT

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PROFESSIONAL SUMMARY

A highly accomplished results-driven strategic Global Total Rewards leader with multi-industry executive level experience in FinTech, Financial Services, Global Markets, Technology and international compensation with State Street, GE Capital and Merrill Lynch. A charismatic, collaborative and respected thought leader, business partner, team builder, mentor, and trusted advisor bringing deep domain expertise and leveraging more than 15 years of experience in consultative design, implementation and administration of plans and programs across businesses and geographies. A leader of high-performing diverse teams across functions to produce results that meet or exceed client expectations and business goals on multiple fronts including: business and functional transformation, mergers & acquisitions, plan design aligned with business objectives, quantitative sales plans, equity plans, benefits, executive compensation and broad-based compensation architecture across multiple national regulatory frameworks.

KEY STRENGTHS & EXPERTISE

- Global Total Rewards Leadership
- Collaborative & Transformational Business Partner
- FinTech, Financial Services, Technology, International
- Excellent Presentation & Communication Skills
- Consultative Design, Implementation & Administration
- Team Builder, Mentor, Trainer, Trusted Advisor
- Executive, Deferred Equity, and Sales Plan Design
- Global Cross-Functional High Performing Teams
- Mergers, Acquisitions, Dispositions, Regulatory
- Executive Presence, Integrity, Confidentiality

PROFESSIONAL EXPERIENCE

STATE STREET CORPORATION, Boston, Massachusetts

2017 – 2021

Managing Director, *Business Unit Compensation, State Street Bank & Trust*

State Street Alpha Platform, *State Street Alpha & Charles River Development (February 2020 – June 2021)*

Led the compensation function/team for State Street's newly formed front-to-back global growth FinTech platform State Street Alpha and the Charles River Development software division. Responsible for development, approval, implementation and administration of FinTech industry-specific rewards models. This rapidly growing FinTech captive is now positioned to integrate Front Office, Middle Office and Back Office IP, to achieve State Street's vision of becoming the industry's most efficient services provider.

- Led the design and implementation new industry-aligned broad-based, equity & sales compensation programs for State Street's premier global specialty FinTech front office solution build-out and SaaS platform, supporting two management committee members and three senior HRBPs. Led add-on Mercatus M&A due diligence process.
- Attracted and retained top financial services technology talent to the Alpha mission to combine portfolio management, trading & execution, advanced data aggregation, analytics and compliance tools together on our new state-of-the-art hosted SaaS platform while incorporating other industry platforms and providers.
- MD+ functional leadership team & Incentive Compensation Control Committee member. Secretary of the State Street Brazil Remuneration Committee and regulatory lead for Business Unit Compensation. McKinsey Wave/A2E process

Business Unit Compensation, *State Street Bank & Trust (2017- February 2020)*

Led the compensation function across global business and support lines for State Street Bank & Trust, a division of State Street Corporation. Led team responsible for advising commercial business unit leadership in the design, implementation and compliant execution of compensation programs, senior executive compensation packages and special initiatives for 26,000 employees in 25 countries. Supported six management committee members, other senior executives, and ten Senior HRBPs - 7+ consultants covering global clients.

- Led cross-functional team responsible for the creation and roll-out of State Street's first company-wide on-line mandatory compensation training aligned with participating manager population expansion and Workday implementation.
- Led compensation workstream merger & acquisition due diligence and integration for State Street strategic acquisitions, including Charles River Development (CRD), BestX, and Natixis Brazil S.A., and investor services lift-out acquisitions.
- Designed and delivered performance-based equity retention plan for acquired FinTech CRD executives and key talent in collaboration with the full acquisition steering committee including State Street's CEO, CFO & CLO.

- Responsible for benchmarking strategies, vendor relationship management and GDPR-compliant contract negotiation. Drove shift to Radford benchmarks for State Street's technology transformation.
- MD+ functional leadership team & Incentive Compensation Control Committee member. Secretary of the State Street Brazil Remuneration Committee and Regulatory Lead for Business Unit Compensation.

GE CAPITAL, Stamford and Norwalk, Connecticut

2007 - 2017

Compensation & Benefits Leader, *GE Capital CLL Americas and GE Capital Real Estate (2015-2017)*

Led team responsible for strategy, process, pay governance & compliance for 5,500+ employees in 10+ countries. Supported five GE officers, 30+ HRMs – 4 US direct reports, 2 non-US matrixed.

- Led compensation strategy and governance of compensation programs, including development, implementation, approval, risk assessment, and documentation.
- Supported US commercial businesses of GE Capital throughout M&A dispositions/platform sales to various buyers - resulted in transfers to successor employers, secure knowledge transfer via deal room, establishment of TSA support during transition, accurate accrual transfers, and close coordination with HQ L&E, BD and Finance.
- Led CLL Sales Compensation Center of Excellence, Material Risk Taker identification, ARO review, and impact assessment, & implementation. Interim support of GECAS aircraft leasing business in 2016.
- Served as GE Capital Benefits Lead - In-house expert regarding all US benefits programs, collaborating with corporate plan owners and developing / delivering layoff benefits training across businesses.

Compensation & Benefits Leader, *GE Capital Real Estate & Restructuring (2013-2015)*

Led team responsible for compensation strategy, process, pay governance & compliance for 1,000+ employees globally across GE's commercial real estate business. Supported two GE officers, other business leadership, and 14 HRMs – one US direct report and dotted line direct report in UK (1/2).

- Senior member of GE Capital C&B strategy team responsible for development and implementation of approach to operating under Federal Reserve oversight as a Systemically Important Financial Institution.
- Led development, implementation, approval, risk review, documentation and governance of formulaic sales plans for salesforce originating in excess of \$5 billion of commercial real-estate lending - ensured that compensation programs aligned with and drove the strategic goals of the business.
- Supported business transformation / pivot-to-debt globally. Reduced business C&B headcount from 5 to 2½.

Compensation & Benefits Leader, *Energy Financial Services and GE Corporate Treasury (2007-2013)*

Managed all compensation processes, pay governance & compliance, and on-site benefits communications for 1,000+ employees globally across GE's private equity & lending business focused on the Energy sector and GE Treasury (added in 2011). Supported two GE officers and 8 HRMs.

- Led planning, approval, implementation and communication of business pay structure shifts.
- In-house benefits expert regarding GE health, retirement and other benefits available to employees. Educated workforce on the transition to high deductible health care plans. Managed all relocation benefits cases within assigned businesses.
- Supported significant business transformation in collaboration with leadership, HR, finance, and counsel.

MERRILL LYNCH & CO. – New York, New York

2004 - 2007

Vice President / Compensation Manager, *Global Securities Research & Economics (2006-2007)*

Managed compensation, for 1,100 payees in Global Securities Research & Economics.

- Administered year-end process, annual benchmarking, and performed monthly assessment of commitments ensuring accuracy of finance accruals.
- Performed valuation of unvested awards for new hire equity buy-outs, determined vesting schedules, secured approvals.
- Designed template used across compensation for public equity share and option buy-outs.

Compensation Manager, *Human Resources, General Counsel & Communications (2004-2005)*

Administered annual variable incentive compensation and merit increases for 1,500+ payees in Human Resources, General Counsel Office, and the Communications group.

- Supported FVP and Director in development of HR metrics report to the company CFO. Collaborated with HRIS to operationalize reporting.
- Interviewed, trained and managed analyst assigned to support General Counsel and Communications.
- Designed and implemented job structure in new Oracle HRIS, for HR, Counsel and Administration.

MCLAGAN PARTNERS, INC., Stamford, Connecticut

2000 - 2004

Product Manager / Associate Consultant

Led client relations, product management, analyst training & management, and quality control.

- Managed client participation for compensation survey products representing revenues of over \$490,000. 150+ asset management clients participated.
- Supported group Managing Director in successful effort to modernize annual incentive plan and long-term compensation plan in order to attract new Chief Investment Officer to investment management firm with over \$4.0 billion assets under management. Attended company board of directors meetings and presented to the board of directors.
- Modeled options for long-term incentive plan and attended client meetings with firm CEO, Head of Human Resources and President of McLagan Partners. Illustrated potential balance sheet effects of a concept performance share plan for a well-known institutional investment firm.

CADBURY SCHWEPPE'S, PLC, Stamford, Connecticut

1997 - 2000

Treasury Analyst

Managed US and Canadian short-term cash positions and short-term investment programs for all North American subsidiaries with average daily cash flows of \$15 million and all US short-term investments.

- Managed over 50 bank accounts in US and Canada for all North American subsidiaries.
- Tracked over \$2.0 billion in external and inter-company investments/debt.
- Member of team responsible for US defined contribution plan oversight

E D U C A T I O N

Master of Business Administration, *Finance and International Business*,

Leonard N. Stern School of Business, NEW YORK UNIVERSITY, New York, New York

May 2002

Bachelor of Arts, *Economics*, MANHATTANVILLE COLLEGE, Purchase, New York

January 1997

- *Minor Concentration in Asian Studies*
- *Awarded National Security Education Program (NSEP) Scholarship for International Study*