



Stefanie Shelley

Executive Coach

Role: Advisors & Coaches

Expertise: Executive Coaching

Last Updated: October 26, 2023

BACKGROUND AND EXPERIENCE

Stefanie Shelley is an Executive Coach with Crenshaw Associates. She brings over 30 years of C-suite experience in CMO and Operating roles at major global institutions in the financial services, fintech and tech-driven business solutions space.

Stefanie works as an Executive Advisor and Coach to senior executives who focus their leadership on driving growth, value creation and business transformation. Stefanie helps clients develop their leadership skills by tackling complex challenges with a broad perspective, structured thinking and a sense of urgency along with emotional intelligence to leverage the best in people and organizations.

Prior to coaching, Stefanie was the Global CMO at Broadridge Financial Solutions, a \$10B global provider of technology solutions. Before that she was the EVP of Bank Marketing at Capital One, where she transitioned a strong credit card brand into a new retail banking business. Prior to that as CMO, Small Business Banking, she led digital transformation at JP Morgan Chase. Earlier, Stefanie managed a \$100B retail deposit portfolio at Citibank and raised \$10B in deposits during a liquidity crisis.

Stefanie is an NACD Certified™ Director with experience on public and private boards. She is currently a Director at Mercer Advisors, a leading RIA and full-service wealth management firm, and Fora Financial, a leader in small business lending. She also sits on the board of the NY Chapter of the NACD and previously served as a Director and Audit Committee member at Green Bancorp [NASDAQ: GNBC].

Stefanie has an MBA in Marketing & Strategic Management from the Wharton School at the University of Pennsylvania and a BA in Economics from Colgate University.

INDUSTRY/BUSINESS SEGMENT EXPERTISE

Financial Services including Banking, Wealth Management, Lending, Credit Cards, Payments, Fintech, Tech-driven business solutions, Professional services, Consulting, Early-Stage Tech-driven Startups.

FUNCTIONAL EXPERTISE

Marketing, General Management, Strategy, Product Management, Client Experience, Sales, Organization Design and Talent Development.

COMPANIES WORKED FOR

Broadridge Financial Solutions, Capital One, Citibank, JP Morgan Chase, GE & GE Capital Services, APM Management Consulting, Bankers Trust Company.

EDUCATION

MBA, Marketing & Strategic Management, The Wharton School of Business at the University of Pennsylvania. BA Cum Laude with Honors in Economics, Colgate University.

CERTIFICATIONS

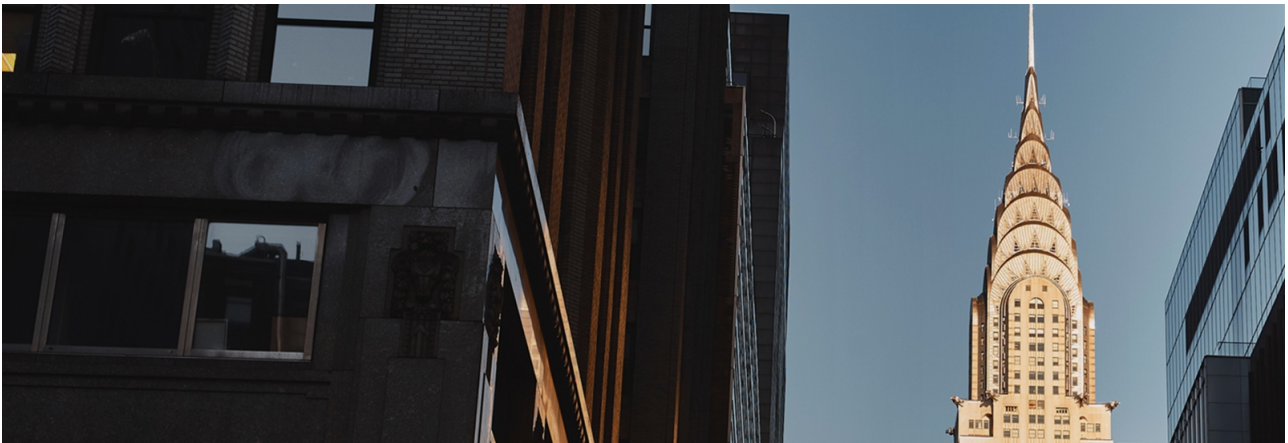
Executive Coaching, NeuroLeadership Institute; Hogan Leadership Assessments; Premier Board Certification, NACD; Competent Boards ESG Designation.

SAMPLE CLIENTS

Pathstone, Ubiquity, BAI Financial Services Industry Association, Michael J. Fox Foundation, Brandt, Tortoise, Engage.

FUN FACT

Treked in the Golden Triangle and stayed with the local Hill Tribes.



ABOUT CRENSHAW ASSOCIATES

40 + years of helping companies and executives thrive.
Delivering today, developing for tomorrow.

We specialize in understanding top talent – exclusively – and in promoting their success.
We support clients who are transitioning, OnBoarding, being groomed for new responsibility, building their team cultures, or aspiring to become corporate directors.