



Mark Harvie

Business, Product and Service Consolidation



Expert areas: Business Transformation, Operational Cost Reduction, Product and Service Alignment/Integration

Summary

Mark is a Director with nearly 20 years experience in wealth management, asset management and consulting, specialising in business transformation and operational efficiency through the alignment and integration of operating models, product and service alignment. Working at Board level, Mark has advised and delivered solutions for a number of leading financial services organisations. Mark has successfully introduced and advised a number of organisations in effectively implementing a sustainable benefits realisation and accountability culture across the business.

Specifics include:

- Set up two fully operational wealth management companies from scratch within different types of financial services organisation (Life & Pensions and Private Bank)
- Significantly reduced the time and cost to market of business change through enhancing the organisational delivery approach within a leading asset manager.
- Led the design and implementation of a new business operating model covering distribution, operations and technology, cutting 40% out of the operational running costs
- Led the development of a new UK/India holistic business model leading wealth manager.
- Devised, developed and rolled out a new portfolio evaluation methodology
- Introducing and educating a number of organisations in effectively implementing a sustained benefits realisation and accountability culture into the business.

Past engagements

- Fidelity International
- Friends Provident
- Rathbone Brothers
- Standard Life
- National Australia Group
- Department for Work and Pensions
- Chase Fleming Private Wealth Management
- JP Morgan International Bank
- Coutts Private Banking
- Zurich Scudder Investments
- C Hoare & Co
- Schroder Unit Trusts
- AXA Investment Managers
- Abu Dhabi Investment Authority
- Scottish Equitable Asset Management

Mark is an active member of the Securities Institute and has presented at a number of conferences on wealth management

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