



## Executive Coach

# Joe Casey

Princeton, New Jersey

Joe is a highly experienced executive coach who partners with clients to identify and develop the critical few areas that can accelerate their growth and enhance their effectiveness. Joe's coaching practice, in its tenth year, focuses primarily on the Financial Services, Technology, and Health Care sectors, where he works with leaders from the Managing Director level to CEO, along with high potential emerging leaders. Joe brings extensive experience with individual and organizational change from his work with executives and global teams.

Prior to becoming an executive coach, Joe spent 26 years at Merrill Lynch, where he was most recently SVP & Head of Human Resources for the Global Markets and Investment Banking business and Merrill Lynch International. At Merrill Lynch, he held various senior leadership roles including Managing Director, Chief Operating Officer for Global HR, and Head of HR for the Merrill Lynch & Co. Corporate groups.

As COO, Joe led a global organizational redesign that led to an annual cost reduction of \$100mm and improved client satisfaction levels. He also led a global restructuring of HR and technology re-design. He was responsible for leading HR for the ML& Co. divisions, including Technology, General Counsel and Finance (over 17,000 employees).

## Education & Certifications

- BA from the University of Massachusetts at Amherst in Psychology
- Masters' degrees from the University of Southern California, the University of Pennsylvania, and Middlesex University (UK)
- Coaching Certificate from Columbia University
- Certified in formal assessment tools including Hogan Assessment Systems, Birkman 360 Feedback, The MHS-EQ-i, and the MHS-EQ-i 360 assessments on Emotional Intelligence, and Voices 360 assessment

## What clients say about Joe

*"Joe's insightfulness is his greatest strength. He's very good at seeing things that others don't see for themselves. By listening to his client, he synthesizes what he hears and then helps you reframe the problem with actionable solutions and tips." Technology Leader*

## Highlights

Member of the Institute of Coaching and the International Coaching Federation

Business Insider named him as one of twenty-three innovative coaches making a difference in people's careers in 2020

His executive coaching practice was named a top 10 Leadership Development Consulting Companies in 2019 by HR Tech Outlook Magazine

Managing Partner of Retirement Wisdom, which helps leaders create meaningful second careers

Has run thirteen marathons including Philadelphia, San Francisco, and the Boston Marathon