



EXECUTIVE FORUM '18

DEBATE. INCUBATE. ACCELERATE.

Jeff Bischoff
Old Greenwich Consultants
Founder and President

After 25 years of experience in executive recruitment within the financial services industry, OGC Founder and President Jeffrey Bischoff has established an extensive network of contacts throughout the wealth management industry, coast to coast.

Jeff's career in the financial services industry began in 1990 as a co-founder for a privately owned executive search business in lower Manhattan. After he and his brother, Warren, expanded the business, they sold it to Oppenheimer & Co., a Manhattan-based private research and brokerage boutique with over 600 advisors. As part of the acquisition, Jeff agreed to head up regional recruiting for OpCo and relocated to Chicago.

After successfully completing that initiative, Jeff transferred to Los Angeles where he oversaw OpCo's west coast talent acquisition and new branch expansion programs. During his tenure with OpCo, Jeff and his brother assisted the firm in establishing and staffing new offices in St. Louis, San Francisco, Newport Beach and Boston. He was promoted to Sr. VP and Limited Partner of Oppenheimer & Co. in 1993.

In 1999, Jeff joined Smith Barney in Los Angeles as Western Divisional Recruiting Officer, overseeing talent acquisition for 110 offices in 8 western states. In 2006, Jeff was promoted to National Recruiting Officer and relocated to Smith Barney's New York City headquarters to focus on recruiting for Smith Barney's Citi Family Office unit as well as their Citi Institutional Consulting unit. In Jeff's eight years at Smith Barney he was directly credited with the hiring of 160 senior level Financial Advisors. In March of 2007, Jeff was recruited to UBS as Head of Recruiting for their Private Wealth Management and Private Bank divisions. In September of 2008 Jeff spearheaded the successful recruitment of 37 senior Lehman advisors.

In June 2009, Jeff founded Old Greenwich Consultants, a retained search firm in Connecticut. He has conducted extensive search and consulting projects for Goldman Sachs, Merrill Lynch, P&G, HighTower, First Republic Bank, Dynasty and a growing list of MFO's and boutique RIAs. In May of 2016, Jeff founded a consulting firm named riaCapitalSolutions as a complementary business to OGC. He refers to this business as "a community of likeminded professionals", all focused on helping high-end "grid paid" FAs become RIA business owners.

Jeff is a co-founding board member of "The Friends of the Eric Sloane Museum" in Kent, CT. He graduated from Villanova University where he earned his Bachelor of Arts degree in English in 1985. He is a published children's book author.