

## David Pottruck

Repeat Best-Selling Author and Former CEO of Charles Schwab

What does it take to be effective during a time of rapid change? How do you increase the likelihood you'll be successful at leading breakthrough change at your organization? David Pottruck, the former CEO of Charles Schwab, is the author of the *New York Times* and Amazon best-sellers *Clicks and Mortar* and *Stacking the Deck*, which offers a nine-step plan for leaders looking to inspire meaningful, lasting change at their organizations. No stranger to reinvention and transformation, Pottruck helped the company revolutionize the way stocks are bought and sold and led Schwab as one of the first companies to rebuild its business model around the internet. His storied 20-year career at Charles Schwab included growing the company from \$50 million in revenue to \$5 billion, increasing client assets from \$25 billion to more than \$1 trillion, and developing a new leadership paradigm at the firm. Pottruck has been a frequent guest on CNBC and has been quoted, interviewed, and profiled by virtually every financial publication of note. He was named by *Smart Money* as one of the three most influential executives in the world of investing, and *Institutional Investor* named him the single most influential executive in online finance. He was also named one of the "Top 15 CEOs" by *Worth*, "CEO of the Year" by *Information Week*, "Executive of the Year" by the *San Francisco Business Times*, and "CEO of the Year" by Morningstar.

His expertise spans finance, transportation, retail, and technology, and he is consistently ranked as the top faculty member at the Wharton School of Business, where he teaches the school's most popular class – leading transformational change – to hundreds of executives from around the world. In 2015, he delivered Wharton's commencement address. Pottruck shows audiences how to develop a game plan for success and be better prepared as they approach and overcome the challenges of change. From linking purpose and mission to communicating honestly and effectively, he gets to the heart of what it takes to flourish in today's rapidly-paced business world.

Building Charles Schwab. After being hand-chosen by Charles Schwab to head its marketing department, Pottruck paved the way for a new kind of financial services firm that would ultimately become the industry standard. Together, the pair set a new tone, with Pottruck becoming "Mr. Inside" of the online stock trading revolution, designing the strategies and putting people in the right place to perform. He and Schwab were co-CEOs for five years, building the company into an industry behemoth. Pottruck also was the originator of San Francisco-style corporate management, influencing the way the upcoming technology businesses managed employees and customers.

Pottruck has been a coach and a teacher all his life, and he claims that his success was due to the things he learned as a wrestling coach at his alma mater, the University of Pennsylvania. In addition to teaching, he serves as a senior fellow in the Wharton School of Business Center for Leadership and Change Management. He also was on the university's board of trustees, donated a new gym in 1999, and gave the Wharton commencement speech in 2002.

Financial Expertise. Today, Pottruck is the chairman of Red Eagle Ventures and Hightower Advisors. He also sits on Intel's board of directors and is the former CEO of Eos Airlines.