

Dai Shi

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Expertise

*Global Financial Services Leader
Asset Management
Growth Strategy
M&A
IPO
Complex Problem-Solving
Large-Scale Transformations,
Governance*

Board Membership

*Mission Square
Foundation
Treasurer*

*Center of Public
Administration and
Services*

*Finance Committee
Chair*

*Illinois State Society
Board Member*

The Well NYC

*Chair of Finance and
Compensation
Committee*

Leadership Experience

*Mission Square Retirement
2020-Present*

CFO

*\$78bn AUMA, \$260m
revenue, \$20-80M Earnings,
620 FTE*

*Equitable (Former AXA US)
2011-2020*

*Group Retirement Business
Line CFO*

*\$40bn AUMA, \$400m
earnings, 400 FTE*

National and International Growth

Dai Shi is a seasoned executive with a robust background in mergers and acquisitions (M&A), international expansion, initial public offerings (IPO), turnarounds, and complex HR, sales, and operational issues. Dai brings strategic thinking, growth-driven leadership, and collaborative skills to any board.

Dai focuses on driving growth while maintaining sustainable profit margins. She believes the financial services industry is the first responder to everyone's economic health — an extraordinary responsibility to society.

When serving as the Regional CFO of AXA Asia between 2011 and 2015, Dai successfully navigated numerous M&A transactions, notably the 2013 AXA-Tian Ping acquisition, a 500m Euro deal. She was instrumental in identifying the target companies, conducting due diligence, valuing the deal, negotiating, and designing governance structures to ensure smooth integrations and maximize value. This transaction, amongst other joint ventures, has driven AXA's international expansion efforts in Asia, delivering double-digit growth in top-line and earnings.

Dai was one of the core members that prepared Equitable [Former AXA US] for IPO in May 2018. Dai has demonstrated a keen understanding of financial markets and regulatory environments. She was proficient in preparing IPO roadshow materials, presenting to credit rating agencies, drafting Management's Discussion and Analysis (MD&A) sections, and filing S-1 registration statements. Post-IPO, Dai continued to guide the investor and the market in interpreting the quarterly result and keeping the business head abreast of peer activity and performance.

Currently serving as the CFO of Mission Square Retirement, Dai leverages her extensive financial acumen and strategic insight to drive sustainable success and growth. Her leadership has revitalized organizations in turnaround situations by implementing effective strategies to restore profitability and growth. From 2020 to 2023, Dai led the business to profitability, generating cumulative operating earnings of \$136m and positive cash flows.

Dai's adeptness in sales and operations ensures streamlined processes and improved performance across all facets of the business. One example is aligning sales incentive programs to revenue generation, resulting in top-line growth. Additionally, Dai has enhanced operational efficiency by optimizing transactions and managing ancillary fees in the client service area.

Known for her strong communication skills and collaborative approach, Dai is effectively serving on two boards: Mission Square Foundation and Illinois State Society. Dai chairs the Finance Committee of the Center of Public Administration and Services. She previously chaired The Well NYC's finance and compensation committees, a mission-driven wellness focus organization based in New York City.

Dai holds an MBA from the University of Illinois and has earned certificates from Columbia University and the University of Geneva. She will enroll in Wharton's Global C-Suite Program in June 2024, further solidifying her expertise and commitment to continuous learning and professional development.

Born in Shanghai, Dai has lived in Chicago, New York, Paris, Hong Kong, and DC and traveled to eighty countries. She understands developed and emerging markets and brings a unique perspective to business challenges. Dai is also board-certified, adding a formal credential to her role and underscoring her expertise in corporate governance.

Dai resides in Washington, DC, and is open to travel for the board she serves.