

CONTACT NAME	CONTACT TITLE	TOPICS	
<b>Scott Colangelo</b>	Chairman and Managing Partner	<ul style="list-style-type: none"> <li>• Company culture and expansion</li> <li>• Mergers and acquisitions</li> <li>• Talent acquisition</li> <li>• Retirement plan design</li> <li>• Retirement plan education</li> </ul>	<ul style="list-style-type: none"> <li>• Fiduciary rule changes</li> <li>• Retirement industry trends</li> <li>• Corporate philanthropy</li> <li>• Fiduciary investment management</li> </ul>
<b>Tim Hakes</b>	President	<ul style="list-style-type: none"> <li>• Mergers and acquisitions</li> <li>• Talent acquisition</li> <li>• Investment advice</li> </ul>	<ul style="list-style-type: none"> <li>• Fiduciary rules</li> <li>• Tips for financial advisor success</li> <li>• Investment trends</li> </ul>
<b>Glenn Spencer</b>	Chief Executive Officer	<ul style="list-style-type: none"> <li>• Company culture and expansion</li> <li>• Mergers and acquisitions</li> <li>• Talent acquisition</li> <li>• Industry Trends</li> </ul>	<ul style="list-style-type: none"> <li>• Corporate philanthropy</li> <li>• Fiduciary rules</li> <li>• Tips for financial advisor success</li> </ul>
<b>Matthew Eickman</b>	Director of ERISA Services	<ul style="list-style-type: none"> <li>• Legislation</li> <li>• ERISA challenges and litigation</li> </ul>	<ul style="list-style-type: none"> <li>• Legal aspects of employee benefits</li> <li>• Fiduciary investment management</li> </ul>
<b>Marco Melero</b>	Multicultural Education Strategist	<ul style="list-style-type: none"> <li>• Multi-cultural education</li> </ul>	
<b>Chris Osmond</b>	Chief Investment Officer	<ul style="list-style-type: none"> <li>• Investment trends</li> <li>• Market trends</li> <li>• Team approach to wealth management</li> </ul>	
<b>Eric Krause</b>	Portfolio Manager	<ul style="list-style-type: none"> <li>• Investment trends</li> <li>• Market Trends</li> </ul>	

## KEY SPOKESPERSON MATRIX

