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Rob's career spans three decades including senior leadership roles at Fidelity Investments and Wells Fargo in institutional investment services and benefit outsourcing. He then consulted clients on selecting fiduciary investment advisors and investment consultant teams for nondiscretionary and full discretionary 3(38) OCIO outsourcing for retirement plans, endowments, and foundations. Rob's understanding of fee structures, vendor strengths, institutional investments, and general account contract features has helped clients by demystifying information to ensure sound decision making. Rob consults with committees to condense content to what is most relevant. Rob works in a consultative role to mitigate risk while improving participant advice services, provide fiduciary oversight and propose data-driven plan design improvements. Rob is a managing director for Creative Planning Retirement Services, one of the country's largest retirement investment advisory firms. Rob attended Miami University in Oxford, Ohio, where he majored in finance and minored in decision sciences. He is a Chartered Financial Analyst® (CFA®) charterholder. He is also a Certified Employee Benefits Specialist® (CEBS®), CPE Compliant and a current class instructor for the International Foundation of Employee Benefit Plans. Rob is an active member the CFA Society of Los Angeles and the CFA Society of San Francisco. Rob volunteers at People Assisting the Homeless (PATH) and is currently a grader for the CFA Level III exam.