



**William (Craig) Dobbs, M.B.A., AIF**

**Managing Director and Institutional Consulting Director  
Morgan Stanley—Graystone Consulting  
Indianapolis, Indiana**

Craig Dobb's financial services career includes over 35 years as an institutional investment consultant—first with Merrill Lynch (1988-2002) and then with Morgan Stanley's Graystone Consulting (2002-current). His primary focus as a consultant has been on Taft-Hartley defined benefit, defined contribution, and health and welfare plans. Craig's current professional duties involve his role as leader of The Dobbs Group. This includes being the team's most senior investment consultant and providing a wide variety of consultant services to their clients. In terms of specific responsibilities, Craig oversees the team's investment policy management, performance evaluation, risk analysis, cost examination and manager selection. He received a B.S. degree in finance from Ball State University and attended the University of Notre Dame's Executive M.B.A. program. Craig is a registered investment advisor with the SEC and a member of the Investment Management Consultants Association (IMCA) and the Association of Professional Investment Consultants (APIC). He received the Accredited Investment Fiduciary (AIF) designation from the Center for Fiduciary Studies at the Graduate School of Business at Pittsburgh.