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Annie Taylor is the head of Cerity Partners Institutional Consulting's Taft-Hartley consulting practice. She is also a Partner and member of the Portfolio Solutions investment committee, which oversees CPIC's discretionary services. Annie has more than 20 years of experience advising Taft-Hartley trusts and other types of institutional retirement plans. She assists these clients with strategic planning and program implementation of their defined benefit and defined contribution plans, health and welfare trusts, and apprenticeship and training funds. Prior to Verus merging with Cerity Partners in April 2026, Annie joined Verus (then Wurts & Associates) in 2003 as a performance analyst in the Seattle office and moved to the Los Angeles office in 2005. Annie is a well-recognized member of the institutional investment industry, particularly in the Taft-Hartley space. She has spoken at many key industry conferences, including the International Foundation, NCCMP, Made in America and the National Benefits Forum. Annie is a member of the Investment Management Committee of the International Foundation of Employee Benefit Plans and a contributing member of the Foundation. Annie also formerly served as financial director for Joan's Wish List, a private foundation that supports survivors of domestic violence. She graduated cum laude from Central Washington University with a bachelor of science degree in finance and a minor in economics. She earned her Chartered Financial Analyst (CFA®) charter in 2007 and is a member of the CFA Institute as well as the CFA Society of Los Angeles.