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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. Recently he consulted clients on selecting fiduciary investment advisors and investment consultant teams for discretionary and full discretionary outsourcing. Rob's understanding of fee structures, vendor strengths, institutional investments, and contract features has helped clients by demystifying information to ensure sound decision-making. Rob consults with committees to condense content to the most relevant. Rob works in consultative roles to mitigate risk while improving participant advice services, provide fiduciary oversight and propose date-driven plan design improvements. 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®) and a current class instructor. Rob is an active member of both the CEBS Los Angeles Chapter, 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.