



## Greenlight Retirement Plan Consultants, LLC

### BIOS

#### Ian Green, CFA, President and Executive Consultant.

- a. Summary: Ian Green is a CFA charter holder and a Subject Matter Expert (SME) in the field of retirement plan cost analysis and mutual fund investment due diligence.

Formerly the Director of Investment Strategies at Voya Financial (formerly ING)'s Institutional Investment Client Services Group, he has over 15 years of experience creating and analyzing retirement plan investment lineups. In his career, Ian has created hundreds of custom fund lineups for Corporations, Universities, Cities, States, and other Institutional Retirement Plan clients nationwide, ranging in size from several million to several billion dollars. He also created the quarterly Voya Financial home-office "Model Portfolios" that were then sold by hundreds of financial advisors and used by thousands of clients in the Corporate, Government, Education and other Non-Profit markets.

In addition, Ian has performed in-person due diligence on hundreds of investment strategies with the investment specialists from most of the country's elite investment management firms. Through his years of experience, Ian is intimately familiar with fees, revenue sharing arrangements, hidden costs and other aspects of retirement plan investing and will share that knowledge openly with clients.

Currently, in addition to running his investment consulting firm, Ian is an adjunct Professor of Finance at CCSU and founding steering committee member of the CT Professionals Leadership Academy.

- b. Post Secondary Education:
- i. Master's of Science in Finance degree from Boston College (Chestnut Hill, MA).
  - ii. Bachelor's of Science degree, Cum Laude, from the University of New Hampshire with a dual major in Business Administration and International Affairs (Durham, NH)
- c. Professional Designation:
- i. CFA charter holder from the [CFA Institute](#) (Charlottesville, VA) and member of the [CFA Society Hartford](#).

- ii. FINRA registered representative Series 6, 7, and 26.
- d. Business Background:
  - i. President, Greenlight RPC, West Hartford, CT 2018 – Present.
  - ii. Adjunct Professor of Finance, Central Connecticut State University, New Britain, CT 2019 – Present.
  - iii. Founding member, Steering Committee of the CT Professionals Leadership Academy. Rocky Hill, CT. 2019 – Present.
    - A cross-professionals leadership program comprised of The Connecticut Bar Association, the Hartford County Bar Association, The Connecticut Society of CPAs, The Connecticut chapter of the American Institute of Architects, The CFA Society Hartford, and the Young Professionals division of Professional Insurance Agents of Connecticut.
  - iv. Director, Voya Financial (formerly ING), Windsor, CT 2005 – 2017
    - Group: Investment Strategies, Institutional Investment Client Services Group.
    - Primary responsibilities included investment related analysis for Voya's Education, Government, and Corporate clients (403b, 457, and 401k plans).
    - Services included mutual fund selection, asset class recommendations, portfolio manager oversight, and performing fund due diligence for Voya's Defined Contribution (DC) clients.
    - Responsible for creating the home-office "Model Portfolio" investment line-ups, as well as custom fund line-ups for many of Voya's clients nationwide.
    - Model Portfolios used by hundreds of clients, wholesalers, and financial advisers.
    - Created comprehensive investment reports for client and management use.
    - Maintained effective communication with clients by providing in-person investment review presentations and investment research.
    - Manager of a team of analysts responsible for investment research and due diligence for some of Voya's largest clients.
    - Provided training and investment education to financial advisors, representatives, clients and junior analysts.
  - v. Senior Investment Manager Research Consultant, John Hancock Financial Services, Boston, MA 2003 – 2004
    - Group: Investment Strategy Group.
    - Primary responsibilities included initial and ongoing manager due diligence, manager and asset class research and reporting, portfolio structuring, and investment reporting to internal management and external clients.
    - Actively monitored investment strategies including domestic equities, fixed income, real estate, and alternative fund of funds for the John Hancock Variable Annuities Trusts.
    - Managed relationships with current and prospective investment managers.
    - Presented and consulted with oversight committees and boards on investment portfolios.
  - iii. Analyst, Lucent Asset Management Corporation, Boston, MA 2001 – 2003

- Group: Asset Management Group for Lucent Technology's \$40 billion Pension (Defined Benefit) and Defined Contribution (401(k)) Plans.
  - Part of a team responsible for the investment decisions for all public market equity and fixed income asset classes of the Lucent Technologies retirement benefit plans, including the Defined Contribution, Defined Benefit, Lucent Endowment, and various post-retirement benefit programs.
  - Responsible for implementing equities and fixed income investment policies, including portfolio structuring, asset allocation monitoring, rebalancing, and compliance monitoring.
  - Monitored investment activity and provided investment reports to the Lucent Pension Benefits Investment Committee.
  - Designed, implemented and managed performance analytics processes and systems for domestic, international and emerging markets equities.
- iv. Risk Management Consultant, Barra ERM, Inc. (now MSCI), Westboro, MA 1998 - 2000
- Group: Enterprise Wide Financial Risk Management.
  - Responsible for client support on financial risk management issues for portfolio managers and Financial Institutions.
- v. Senior Brokerage Firm Liaison. State Street Research and Management (now BlackRock), Boston, MA 1994 - 1998
- Group: Investment Client Services.
  - Responsible for helping brokers and financial representatives with trading issues.
  - Title: Investor Services Representative.
  - Responsible for helping mutual fund investors with all inquiries regarding their investments.