

## **SPEAKER BIOGRAPHY**

Joshua P. Itzoe, CFP®, AIF® is a Principal of Greenspring Wealth Management, a registered investment advisory firm and professional independent fiduciary in Towson, MD. He leads the firm's institutional advisory practice which provides fiduciary governance consulting and ERISA-defined "Investment Manager" to qualified retirement plans that generally range between \$5 million and \$50 million.

Itzoe is the author of the book *Fixing the 401(k): What Fiduciaries Must Know (And Do) To Help Employees Retire Successfully* and has written about fiduciary responsibility for *Benefits & Compensation Digest*. He also publishes the "Fixing the 401(k)" blog ([www.fixingthe401k.com](http://www.fixingthe401k.com)) and is an acknowledged authority on the topics of 401(k) plans and fiduciary matters. He has been quoted extensively in publications such as *The Wall Street Journal*, *SmartMoney Magazine*, *Kiplinger's Retirement Report*, *Wealth Manager Magazine*, *The Baltimore Examiner*, *Journal of Financial Planning*, *Investment Advisor*, *Registered Rep*, *PLANADVISER Magazine*, *Financial Advisor* and *National Underwriter Life and Health*.

Itzoe graduated with honors from Wake Forest University with a Bachelor of Arts degree and has served as an Instructor for the Community College of Baltimore County (CCBC) in the area of financial planning. He is a CERTIFIED FINANCIAL PLANNER™ and an Accredited Investment Fiduciary®.

While at Wake Forest, Josh was a four-year starter for the baseball team and spent several years playing professionally after graduation. He lives with his wife Jessica, son Caleb, and daughter Lydia in Lutherville, MD.