

ROLAND | CRISS

Key Executive Summary

RONALD E. HAGAN



Ronald E. Hagan is President and CEO of Roland|Criss. Through its **fiduciary services** unit Roland|Criss offers a quality management system for corporate retirement plans, public pensions, and university endowments. Through its **certification services** unit it conducts audits of investment managers and investment advisors for CEFEX and recordkeeping firms for ASPPA.

Ron supervised the first certifications of investment managers, investment advisors, and investment stewards in the United States, Australia, New Zealand, and Canada. He also supervised the first audits of recordkeepers under ASPPA's certification program.

Ron has a lengthy career in developing retirement plan fiduciary processes and advising fiduciary committees on investment governance practices. He is a co-developer of Roland|Criss' FiduciaryPLUS™ program.

Prior to joining the Roland|Criss team he was a Senior Vice President and member of the Executive Committee of the First National Bank of Commerce. During his tenure, he also served as a fiduciary on its Asset Liability Management Committee. Earlier in his career Ron was a Principal with Booz, Allen & Hamilton. While there, his duties included advising executives of Fortune 500 companies on correct fiduciary processes.

Mr. Hagan has published numerous articles on the subject of investment fiduciary standards of care. He is a frequent speaker at industry trade conferences and national webcasts.

Ron is a member of the ASPPA Certification Task Force for recordkeepers. He is also Chairman of the Board of Directors of the Investment Fiduciary Leadership Council, which is the trade association for certified investment firms. He is also a member of CEFEX's Advisory Council.

Mr. Hagan is an Accredited Investment Fiduciary Analyst™ (AIFA®). This qualifies him to conduct and supervise independent fiduciary reviews for those persons concerned about their responsibilities for investing the assets of endowments and foundations, ERISA qualified plans, private family trusts, public employee retirement plans as well as high net worth individuals. He is an alumnus of Erie College with a degree in accounting.

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