

## Ed Lynch



Ed Lynch has worked with ERISA-qualified plan sponsors and designated fiduciaries in most aspects of plan development and maintenance since the early 1980s.

In 2003, Ed became one of the first practitioners in the United States to complete the Accredited Investment Fiduciary Auditor, AIFA®, program of advanced studies at The Center for Fiduciary Studies (Joseph Katz School of Business, University of Pittsburgh).

In September 2008, Dietz & Lynch Capital, formerly 401(k) Advisors Group, became “[one of] the first Investment Advisors globally” to successfully complete the Centre for Fiduciary Excellence (CEFEX) independent certification process. The CEFEX certification “provides assurance to investors, both institutional and individual, that Dietz & Lynch Capital has demonstrated adherence to the industry’s best fiduciary practices...indicating [it’s] interests are aligned with those of investors.”[1]

In 2009, Ed was voted by his peers as one of the 40 “Most Influential Retirement Plan Advisors” in the United States in a national survey conducted by the 401(k) Wire, the 401(k) Exchange and The Boston Research Group. Based on over 100,000 votes from the industry, business metrics and input of an editorial board, the top 300 and top 40 were recognized for their business success, and their influence on retirement plans, their fellow advisors and retirement plan providers.

## **Lynne McAuley**



Lynne McAuley served as an auditor for the U.S. DOL/EBSA from 1990-2004. Over her tenure, she investigated over 200 qualified retirement plans and welfare plans. The primary focus of her investigations was the conduct of plan sponsors and other fiduciaries relative to the prudence of their investment selection and monitoring process. She assessed the practices of employee benefit service providers, and evaluated if plan sponsors and other fiduciaries complied with the reporting and disclosure provisions of ERISA and other related Federal laws