



INSIGHTS

Speaker Biography

Trisha Brambley

Trisha Brambley is President of Retirement Playbook, Inc.; the firm provides plan sponsors with robust plan advisor due diligence and search process, conducts pertinent training for plan investment committees, and prepares studies on retirement plan issues. The firm also provides broad based financial education for employees using workshops, web-ex, an online learning center and a financial coach telephone service. The firm does not sell financial product and is independent and unbiased.

Noted Expert

Ms. Brambley is frequently quoted in the press including The Wall Street Journal and USA Today. In addition, she is a speaker on many national forums that focus on retirement plan issues, including the Profit Sharing Council of America and the Center for Due Diligence. Appointed by the Secretary of the DOL to serve on the ERISA Advisory Council for a three-year term. She prepared DOL recommendations on target

date fund analysis, stable value issues and participant financial education. She served as Vice Chair of the Council in 2008 and as Chair for the study of stable value funds in 2009. She has been included in annual 401k Wires' "Most Influential in the Retirement Plan Industry" for the past several years.

Innovator

In addition to launching Retirement Playbook, Inc., Ms. Brambley's background also includes launching one of the country's first plan advisory firms in 1995, which was among the largest in the country and included in Plan Sponsor's "Top Advisory Firms and Best Consultants".

As part of the team that developed the country's first 401(k) plans, Ms. Brambley was involved in all aspects of bringing these plans to life. Her role included the successful creation of the first 401(k) education programs, putting together plans that fit with the client's culture that adopted them, and working through the early 401k trials, tribulations and excitement in uncharted waters.

National Plans Consultant

As Vice President of Retirement Plan Services for an international benefits consulting firm, Ms. Brambley's role included senior management, national leadership, and serving as lead consultant for the firm's largest and most prestigious clients.





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Liz Davidson

Founder and CEO, Financial Finesse

Liz Davidson is CEO of Financial Finesse, the leading provider of unbiased financial education programs for employers nationwide, delivered by on-staff Certified Financial Planner™ professionals. Liz started Financial Finesse over 10 years ago as an early pioneer in the financial education industry and today she is widely recognized as one of the nation's foremost experts in employee financial education. She has been profiled in hundreds of publications, radio and television shows, including BusinessWeek, Fortune Small Business, Inc., Fast Company, Institutional Investor Magazine, LA Business Journal, HR Magazine, Employee Benefits News, Time Magazine, NBC Nightly News, CBS MarketWatch Radio, and many others. Liz also pens a weekly blog for Forbes.com.

Liz has an MBA from UCLA's Anderson School of management with a concentration in Finance.

