



INSIGHTS

Speaker Biography

David E. Palascak, AIF®, CFA fi360 Vice President, Tools

Dave is responsible for product development and ongoing management of the online tools and other tools-related products. He is also the core relationship manager for enterprise advisor and service provider subscriptions to the online tools.

He has been with fi360 since 2003 serving in various roles throughout the company. Most recently, Dave served as the Tools Product Manager where he led the development for many of fi360's current features including the Model Portfolios Reports and the 408(b)(2) and 404(a)(5) Fee Disclosures.

Dave graduated Magna Cum Laude from the University of Pittsburgh in 2003 with a BSBA in Finance. Dave holds the Accredited Investment Fiduciary designation, the NASD Series 65 license and is a Chartered Financial Analyst (CFA) Charterholder.





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Speaker Biography

Michael F. Limbacher, AIF® fi360 Tools Product Associate

Michael is responsible for product support and demonstrations of fi360's Tools. He also assists in the enhancement and quality assurance of the Tools.

Michael obtained his MBA from the Katz Graduate School of Business at the University of Pittsburgh while concentrating in Finance. He also has graduated from Miami University with a BS in Business, majoring in Management Information Systems. He has recently received the Accredited Investment Fiduciary® designation from fi360.





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Speaker Biography

Cody Snyder, AIF® Tools Product Associate

Cody joined fi360 in September 2011 and is responsible for product support and quality assurance of fi360's Tools suite.

Prior to joining fi360, Cody worked at The Bank of New York Mellon as a trade specialist. He provided professional support to investment managers through timely and accurate processing of trade instructions and related transactions. During his tenure at BNY Mellon, Cody interacted with over 250 financial institutions and strengthened relationships with J.P. Morgan, Goldman Sachs, PNC, Prudential, and Invesco.

Cody served as an advisory board member for Aurora Technology Solutions, an education technology start-up company, and researched financing options and supply chain management improvements. Additionally, Cody managed business operations for Pitt Pendulums and held an executive board position within the group for three consecutive years; his initiatives generated financial support and public awareness for the Animal Rescue League of Pittsburgh, the Lupus Center of Excellence and the Hillman Cancer Center through cooperative event planning.

Cody graduated from the University of Pittsburgh in 2011 with a BSBA in Finance and a minor in Economics.

