



INSIGHTS

Speaker Biography

Lee Topley, AIF®

MANAGING DIRECTOR, RETIREMENT PLAN CONSULTING GROUP, UNIFIED TRUST COMPANY

Mr. Topley is responsible for the management and oversight of the overall business strategy for the Retirement Plan Consulting Group at Unified Trust Company. This group provides retirement plan services for over 500 retirement plans with assets that exceed \$2 billion.

Mr. Topley has more than 30 years of experience within retirement services that includes the management of business development, relationship management and client service personnel within investment management and trust units of major financial services organizations.

Prior to joining Unified Trust Company, N.A., he served as Senior Vice President and Product Committee Chairman for the Retirement Services business for one of the largest regional banks in the Midwest. As a member of Unified Trust Company's Trust Executive, and Trust Investment Committees, he participates in formulating and administering company policies and developing long range goals and objectives.

Mr. Topley received his BS in Accounting from Pennsylvania State University and is an Accredited Investment Fiduciary®.

