

Is a 3(38) Worth it?

The Outsourcing Dilemma





Shelby George, J.D., CEBS

Senior Vice President, Advisor Services

Manning & Napier

Shelby George is a Senior Vice President, Advisor Services at Manning & Napier. In this capacity, she is responsible for understanding the diverse needs of employers, individuals, their advisors and consultants, as well as identifying how Manning & Napier can help to provide holistic solutions to meet those needs. Shelby has 10 years experience in the financial services industry, working as an ERISA attorney and consultant.

Shelby is a frequent speaker at numerous industry events including: NAGDCA, fi360, Cambridge Ignite, RBC Wealth Management Managed Solutions Symposium, and the ASPPA Benefits Council of Central Florida. In addition, Shelby is frequently quoted for her expertise in retirement and financial planning topics in national industry publications including U.S. News & World Report, PlanSponsor, PlanAdviser, Bloomberg Businessweek, WealthManagement.com, SHRM, WSJ Digital, 401kWire.com, Ignites, and BenefitsPro.

Shelby earned her BA in Political Science from Westmont College. She earned her JD from the University of California Hastings College of the Law and is licensed to practice law in New York State. She has also earned her Certified Employee Benefit Specialist (CEBS) designation through the International Foundation of Employee Benefit Plans.





Michael Woods

Executive Vice President, Co-Owner
Pensionmark Financial Group, LLC

Michael Woods joined Pensionmark Financial Group, LLC in 2009 bringing with him experience on both the plan provider side, as one of the top wholesalers for ING Retirement Solutions, and as a plan advisor. He currently acts as the Executive Vice President, OSJ Branch Manager, and Co-Owner of the organization with a focus on developing retirement plan solutions for our corporate clients as well as our national network of advisors. Over his career, Michael has worked extensively with corporations and non-profits in the field of qualified and non-qualified retirement programs.

Awards & Recognition

- Recognized as a Top 10 Advisor in the 401kWire's Large-Market category
- 2007 Highest Regional Director Sales
- One of the nation's most influential retirement plan advisors by 401kWire (2009)
- Named to 401kWire's list of 300 Most Influential DC Advisors (2010-2012)
- Named as one of the Top Retirement Plan Advisors in the Nation by PLANSPONSOR Magazine (2006-2017)

Education & Certifications

- BS in Economics at Fitchburg State University
- Series 7, 24, 65 registrations
- International Honor Society of Economics





Ryan Clark, CIMA, CMFC, AIF

Senior Vice President, Director, Fiduciary Services

[Investnet Retirement Solutions](#)

Mr. Clark serves on the Investnet Retirement Solutions investment committee responsible for monitoring qualitative manager due diligence and developing capital market assumptions.

Previously, Clark was the Chief Investment Officer at Fiduciary Plan Review, which Investnet acquired assets of in 2013. Clark is a former board member for Defined Contribution Institutional Investment Association (DCIIA) and has spent time at Mesirow Financial, Morningstar, and Ibbotson Associates.

A graduate of Miami University in Ohio, Clark also earned his M.S. in Finance and M.B.A from DePaul University's Kellstadt Graduate School of Business. Clark has received his Certified Investment Management Analyst (CIMA), Chartered Mutual Fund Consultant (CMFC) and Accredited Investment Fiduciary (AIF) designations.





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