

## Edward M. Lynch, Jr.



Mr. 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, Mr. Lynch became one of the first practitioners in the United States to complete the Accredited Investment Fiduciary Auditor, AIFA<sup>®</sup>, program of advanced studies at The Center for Fiduciary Studies (Joseph Katz School of Business, University of Pittsburgh). In September 2008, Mr. Lynch became one of the first Investment Advisors globally to successfully complete the Centre for Fiduciary Excellence (CEFEX) independent certification process.

In 2009, he 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.

He is a graduate, *summa cum laude*, of Gordon College and is a member of a number of professional and employee benefits organizations as well as a frequent speaker on ERISA-plan topics.

## Lynne McAuley



From 1990 to 2004, Lynne served as an auditor for the United States Department of Labor's Employee Benefits and Security Administration (EBSA) in the Boston Regional Office where, over her tenure, she investigated over 200 qualified retirement plans and welfare plans.

The primary focus of her investigations during her years with the Department 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.

She is a CPA, an Accredited Investment Fiduciary Analyst (AIFA®), and Certified Employee Benefits Specialist (CEBS). She has a Master of Public Administration (MPA) from Kentucky State University and a Bachelor of Arts degree from Drew University.

## **Charles G. Humphrey**



Charles G. Humphrey is a consultant to Fiduciary Plan Governance, LLC and the principal of the Law Offices of Charles G. Humphrey in Buffalo, NY and Andover, MA. He has concentrated his practice in the area of ERISA and employee benefits for over 35 years, assisting employers with their plan obligations and financial institutions, with their retirement plan product offerings. He believes that many of the problems he sees could have been avoided had the plan sponsor had a basic understanding of its responsibilities and adopted “prudent” but simple processes and procedures.

He is a member of the IRS Northeast Pension Liaison Committee and a former member the IRS National Determination Letter Committee. He holds an undergraduate degree from the University of Michigan and a law degree from the University of Buffalo Law School. He is admitted to practice in New York and Washington, D.C.

## Raelene LaPlante

Raelene has a diverse background in the employee benefits field. She was a Senior Investigator with the United States Department of Labor's Pension Welfare Benefits Administration (PWBA, now EBSA) in the Boston Regional Office. During that time she investigated qualified employee benefit plans for compliance with the provisions of Title One of ERISA.

Her other experience includes positions with State Street Bank and Trust Company; IRS Office of Chief Counsel; The Pension Rights Center; and Ernst and Young LLP. Raelene successfully passed NASD Series 6 Limited Representative; NASD Series 63 VT and NH; and NASD Series 65 Investment Advisor Licenses. She has an LL.M in ERISA from The John Marshall Law School, a J.D. from Case Western Reserve University School of Law, and a B.A. from Simmons College.

Terry Power has been in the Retirement Plan industry since 1981. He has been involved in the design, installation and day-to-day operation of corporate retirement plans for more than 3,000 clients during his career. He is the founder and developer of The Platinum 401k™ Multiple Employer Plan Program.

He is a Past President of the Florida West Coast Employee Benefits Council, a member of the Tampa Pension Council, a member of the American Society of Pension Professionals & Actuaries (ASPPA), and the Committee for the Fiduciary Standard. He is an alumnus of Canisius College in Buffalo, New York.

He was named by [401wire.com](http://401wire.com) as one of the Defined Contribution Industry's "300 Most Influential Individuals" for 2010 and has been nominated for that organization's "100 Most Influential" list on several occasions.

## Terrance Power



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Terry has spoken before many industry groups including the American Society of Pension Professionals and Actuaries (ASPPA), fi360, DCPI, PLAN ADVISER National Conference, and the Center for Due Diligence on the topic of Multiple Employer Plans. He has written several articles relating to qualified retirement plans during his 31 years in the industry, the most recent being his article that was published in the August 2011 issue of PLAN SPONSOR magazine.

He is also the owner and moderator of the [LinkedIn.com](http://LinkedIn.com) group "401k TPA Network", the largest group of it's kind on the internet with over 2,300 individual members.

He is also very involved in the Professional Employer Organization (PEO) industry through his company's 12 year relationship with the National Association of Professional Employer Organizations (NAPEO)

where he has served as a Director on that organization's Associate Member Advisory Board during his 21+ years of working with PEO clients.

Terry enjoys flying in his spare time. He is an FAA licensed private pilot and Instrument Ground Instructor.

He can be reached via email at [tpower@ThePlatinum401k.com](mailto:tpower@ThePlatinum401k.com) or by phone in Clearwater, Florida at 800.585.7540, x110.