

SPEAKER BIO

THERESA "TESS" MALONE, AIF®, FLMI, PRP

Institutional Retirement & Investment Practice Leader

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Tess is the Institutional Retirement & Investment Practice Leader at Blue Prairie Group. She has 25 years institutional retirement consulting experience. She worked for a Fortune 250 financial services firm, The Principal Financial Group, earlier in her career. While at Principal, she led their in-house ERISA consulting division supporting 29,000 retirement plan sponsors across the United States. In this position, she worked with plan sponsors, national consulting firms and ERISA attorneys to design, implement, and administer both DC and DB retirement programs. Tess' plan design consulting expertise includes: Cash Balance, Traditional Defined Benefit, 401(k) and Non-Qualified plans.

Tess is on the Board of Directors of the Des Moines Metro Opera, a member of the St. Francis of Assisi Homeless and Hungry Committee and a member of the Des Moines A.M. Rotary Club. She served as the Development and Implementation Coordinator of the DSM Metro Unified Government Advocacy Group. In 2002, she was recognized as one of Des Moines' "Top 40 Business Leaders Under 40" by the Des Moines Business Record. She's also a graduate of the Greater Des Moines Leadership Institute.

Tess has the Accredited Investment Fiduciary® (AIF) designation. The AIF® designation is from the Center for Fiduciary Studies, Wharton School of Business. This designation signifies an investment professional has demonstrated an ability to manage an investment process to a defined Fiduciary Standard of Care. She is also a Fellow with the Life Management Institute (FLMI), with "Distinction" honors and a NASD Registered Representative with her Series 6, 7, 63 and 65 designations. In 2007, she was awarded the PLANSPONSOR Institute's prestigious PLANSPONSOR Retirement Professional (PRP) designation. PLANSPONSOR is one of the nation's leading resources for independent pension information.

Recent Speaking Engagements and Publications

"Understanding Stable Value Funds in Uncertain Times" – PLANSPONSOR's Future of Asset Allocated Funds Conference, October 2009

"Evaluating Stable Value Investments In This Challenging Market Environment" Blue Prairie Group Position Paper, August 2009

"Is Your Retirement Plan a Competitive Advantage or Liability? - Benchmarking Your Plan" PLANSPONSOR's Plan Designs Conference, June 2009

"Retirement 101 – How to Help Employees Help Themselves" Talent Management Magazine, May 2009

"Valuing the Benefit: How to Ensure that Participants Understand the Custom Target-Date Option and Re-enrollment" P & I Custom Target Date Strategies Summit, April-March 2009

"Staying Calm in Choppy Waters" P & I Retirement Income Solutions Summit, October 2008

"PLANSPONSOR's Future of Asset Allocation Conference" PLANSPONSOR, March 2008

"401k Excess Revenue Recapture" Western Pension and Benefit Conference, March 2008