



Ronald J. Surz holds the following positions

- ✚ President of Target Date Solutions (TDS) (www.TargetDateSolutions.com), providing custom designs for target date lifecycle funds using the Safe Landing Glide Path[®].
- ✚ President of PPCA, Inc (www.PPCA-Inc.com), an investment technology firm in San Clemente, CA , specializing in performance evaluation and attribution software, primarily for financial consultants and sophisticated institutional investors.

Ron has served on several boards and councils including the Investment Management Consultant's Association (IMCA) Board of Directors, the CFA Institute's Consultant/Investor GIPs Committee, and the Advisory Boards of Capital Markets Research, Rockwater Hedge, RCG, and Sortino Investment Advisors.

Mr Surz earned an MBA in Finance at the University of Chicago and an MS in Applied Mathematics at the University of Illinois, and holds a CIMA (Certified Investment Management Analyst) designation.

He has published regularly in financial journals and books. His most recent book is "*Hedge Funds: Definitive Strategies and Techniques*", co-edited by Kenneth Phillips of HedgeMark LLC.



FRED REISH is an ERISA attorney whose practice focuses on fiduciary responsibility and plan operational issues. His clients include plan sponsors/fiduciaries, broker-dealers/RIAs, recordkeepers/TPAs and other financial service companies and providers. He was recognized as one of the 15 “Legends” of the retirement industry by *PLANSPONSOR* magazine and is consistently one of the 401(k) Industry’s Most Influential Persons by 401kWire, the Commissioner’s Award and District Director’s Award by the IRS, Eidson Founder’s Award by ASPPA, and the Institutional Investor and *PLANSPONSOR* magazine Lifetime Achievement Awards. He has written over 350 articles, four books, including a monthly column for *PLANSPONSOR* magazine.