



DAVID J WITZ, AIF®

DAVID J WITZ, AIF is Managing Director of *Fiduciary Risk Assessment LLC (FRA)* and *PlanTools, LLC*. He has over 28 years of investment, plan design, administration, and fiduciary consulting experience. He started with Principal Financial Group in 1981, bought a TPA in 1986, sold it 1996 and has held positions with four other national TPA firms before forming FRA including BGS&G, CBIZ, the Geller Group, and The Newport Group. He has been published in the ASPPA Journal, BNA, Journal of Benefits & Compensation, and CPA Journal. He has been retained as an expert witness on ERISA matters and participated on advisory boards for Principal Financial, Mass Mutual, CBIZ, Asset International, Inc. and CFDD. He has spoken before the AICPA, ASPPA, NABT, CFDD, fi360, Financial Planning, OSU Law School, ISCEBS, North Carolina CPA/Law Forum, PLANSPONSOR, and RADA. He serves on the Board of Advisors for the Institute of Business & Finance and was previously a financial talk radio show host on WWVA. David is a 1981 graduate of PSU with a B.S. in Economics, Insurance, and Real Estate.