



Steven W. Kaye

AIF®, CFP®, CLU, ChFC, RHU, CEBS, AAMS, CRC

Steven W. Kaye is President and Founder of AEPG Wealth Strategies, which provides comprehensive, holistic financial and estate planning, investment management, pension and employee benefits consulting for individuals and businesses for more than 30 years.

He is a past President of the New Jersey Society of the Institute of Certified Financial Planners. Mr. Kays has also been quoted in the financial press trade journals and appears on television programs such as CNBC's *The Money Club*, NBC's *The Today Show* and *Fox on Money*. He is the only RIA to be featured in Morningstar on four occasions.

Mr. Kaye was a recent featured speaker at recent national conferences, including Certified Employee Benefit Specialists national convention, PlanSponsor national conference, and Schwab IMPACT national convention. He has presented on some of the leading edge strategies and Best Practices in the 401(k) and Defined Benefit industry.





Aldo S. Vultaggio **CFA, CPA**

Aldo S. Vultaggio, CFA, CPA is Senior Portfolio Manager at AEPG Wealth Strategies with over \$800M in assets under management including over \$300M in defined contribution assets under advisement.

Aldo is an expert in product due diligence and research relating to portfolio construction. Aldo serves as AEPG's lead defined contribution plan investment fiduciary, responsible for conducting manager due diligence and monitoring the investment products used across all of AEPG's DC plan clients, including large corporations and small business partnerships.

Aldo regularly quoted in the Wall Street Journal and was a speaker on the Stable Value panel at the 2013 PlanSponsor national conference.

Aldo is a Chartered Financial Analyst (CFA). He earned an MBA in Finance and Accounting from Baruch College Zicklin School of Business and a Bachelor's degree in Engineering from Villanova University. Aldo is also a Certified Public Accountant (CPA).

