

Bert M. Carmody



Bert M. Carmody, CPA, CIMC[®], AIF[®] is the founding Principal of Southeastern Fiduciary Services, LLC, a firm focused on improving the total fiduciary performance of plan sponsor fiduciaries. He performs independent fiduciary reviews, serves as company stock trustee in plans, serves as an independent fiduciary in transactions and performs service provider searches. He has extensive experience in this field since the early 1980s, served in all positions of this industry from recordkeeping and back office operations to board presentations and investment reviews. Mr. Carmody swallowed the fiduciary “Kool-Aid” about 10 years ago and has focused his practice on helping plan sponsors improve their total fiduciary performance with an approach of recommending not only what to do but how to do it

Mr. Carmody received a B.A. from George Mason University and a M.B.A. from George Washington University. He is a Certified Public Accountant in Georgia. He is a Certified Investment Management Consultant (CIMC[®]) holds the Accredited Investment Fiduciary (AIF[®]) designation.