

## Dave Gray



Dave Gray brings more than 13 years of diverse experience in the retirement services industry to his role as vice president of client experience at Schwab. Under his leadership, the client experience and product management team operates with an outside-in perspective that enables it to design solutions for plan sponsors and participants that are innovative and cohesive across all customer touch-points. Prior to Schwab, Mr. Gray has also held leadership positions in plan sponsor services, relationship management, institutional sales, business development and general management.

Prior to joining the company, he was vice president of client service for The Standard, where he led the national relationship management and education teams. Previously, Mr. Gray served as vice president and regional director for Invesmart Inc., where he managed all facets of retirement service for four offices. He holds a bachelor's degree from Tennessee Temple University. Mr. Gray is also a Certified Pension Consultant (CPC) and holds FINRA Series 7, 24 and 66 licenses.