

RETIREMENT SYSTEMS | EXECUTIVE LEADERSHIP | PUBLIC ADMINISTRATION | GOVERNMENT RELATIONS

EXECUTIVE LEADERSHIP

Executive leader with 30 years of experience overseeing public retirement systems, investment programs, and government organizations. Directed institutions responsible for over **\$75 billion in retirement assets**, serving **430,000+ members**, managing operating budgets of up to **\$45 million**, and leading executive teams spanning investments, operations, finance, technology, communications, and legislative affairs.

PERFORMANCE IMPROVEMENT

Partnered with industry leaders, trustees, policymakers and legislators to improve long-term retirement outcomes and organizational performance. Led investment, funding, operational, and policy initiatives that strengthened retirement systems, modernized service delivery, improved participant outcomes, and enhanced long-term financial sustainability.

EXPERIENCE

Maryland State Retirement and Pension System | Executive Director | 2021 – 2025

Led one of the nation's largest public retirement systems, overseeing a **\$75B defined benefit plan**, **\$8B defined contribution plan**, **\$45M operating budget**, **430K members**, and **263 employees**.

Financial Stewardship & Investment Oversight

- Improved risk-adjusted investment performance through asset allocation, fee reductions, internal asset management, and rebalancing.
- Leveraged a 26.7% annual investment return to reduce the assumed rate of return from 7.45% to 6.8% while maintaining funded status and avoiding increased employer contributions.
- Partnered with trustees, actuaries, and policymakers to strengthen the system's long-term financial position.

Operational Excellence & Member Experience

- Reduced member call wait times from **523 seconds to fewer than 25 seconds**.
- Launched virtual retirement counseling services and modernized service delivery operations.
- Established agency-wide KPIs and multi-year performance objectives to improve accountability and execution.

Policy, Governance & Organizational Leadership

- Successfully advanced legislation adopting layered amortization to strengthen long-term funding stability.
- Strengthened cross-functional collaboration and broke down organizational silos across the agency.
- Introduced leadership development programs, employee engagement initiatives, competency-based hiring practices, and monthly town halls to improve culture and communication.

State Universities Retirement System of Illinois | Executive Director | 2016 – 2021

Led a statewide retirement system for higher education overseeing a **\$22B defined benefit plan**, **\$3B defined contribution plan**, **\$30M operating budget**, **230K members**, and **174 employees**.

Investment Leadership & Retirement Plan Innovation

- Strengthened investment performance and governance by recruiting and developing a new Chief Investment Officer and guiding trustee education on investment strategy and decision-making.
- Redesigned the optional defined contribution plan and created a new 457(b) plan using best practices, including income-focused defaults and streamlined, curated, and low-cost investment offerings.
- Developed digital decision-support tools to improve members' retirement planning choices.
- Earned national recognition as a **2021 Plan Sponsor of the Year finalist**.

Member Experience & Service Excellence

- Achieved member satisfaction ratings exceeding **95%** while operating in a resource-constrained environment.
- Expanded member-service capacity through the recruitment and development of 20 additional service representatives.
- Earned **Pensions & Investments' First Place Eddy Award** for excellence in member communications.

Stakeholder Engagement & Industry Leadership

- Built trusted relationships with legislators, trustees, higher education leaders, employee groups, and other key stakeholders.
- Served as a recognized thought leader on retirement policy, governance, and plan design.
- Elected by peers to serve as **President of the Association of Illinois Public Retirement Systems**.

Executive Team Development & Organizational Transformation

- Rebuilt and strengthened the executive leadership team during a period of significant succession, hiring and developing two internal and three external executive leaders.
- Improved governance practices, organizational culture, and strategic alignment among staff and trustees.
- Led development of the organization's strategic plan while advancing modernization, technology improvements, and operational efficiencies.

Teachers Insurance and Annuity Association (TIAA) | 2007 – 2016

Held senior leadership roles spanning retirement policy, government affairs, business development, and institutional sales, helping expand TIAA's presence within state governments, higher education systems, and other public-sector retirement markets nationwide.

Retirement Policy & Industry Leadership

- Advised policymakers and public officials on pension reform, retirement readiness, and defined contribution plan design across multiple states.
- Promoted industry best practices in retirement plan governance, participant outcomes, and lifetime income solutions.
- Served as a recognized subject matter expert on optional retirement plans, hybrid plans, supplemental savings programs, and annuity-based retirement solutions.

Legislative Advocacy & Market Development

- Supported the passage and defense of statewide 403(b) initiatives, including successful legislative efforts in Iowa, Ohio, and Michigan.
- Partnered with legislators and institutional clients to redesign retirement programs, improve participant outcomes, and expand access to workplace retirement savings.
- Successfully advanced policy initiatives supporting optional retirement plans, automatic enrollment, and enhanced retirement savings opportunities.

Business Development & Strategic Relationships

- Leveraged extensive government, procurement, and public-sector experience to support business growth and expand institutional relationships.
- Built and maintained relationships with policymakers, regulators, higher education leaders, public employers, consultants, and industry organizations nationwide.
- Represented TIAA through active engagement with organizations including the NGA, NAST, NAIC, NCSL, DGA, and RGA.

Office of the Illinois State Treasurer | Deputy Treasurer and Progressive Leadership Roles

Advanced through a series of increasingly senior leadership positions culminating in service as Deputy Treasurer. Managed a **\$20M operating budget**, supported oversight of a **\$15B investment portfolio**, and led initiatives spanning legal, investments, legislation, procurement, communications, and public policy.

Highlights

- Helped create and oversee Illinois' **\$2B 529 college savings program** and a **\$75M private equity fund**.
- Drafted over **100 bills and amendments** and helped advance significant state financial and investment legislation.
- Chaired investment and loan committees overseeing billions in public assets, including **\$9B in state investments**, **\$6B in local government assets**, and **\$1B in linked-deposit loan programs**.
- Testified on hundreds of bills and amendments and participated on a **United States Senate subcommittee panel on 529 college savings plans**.

EDUCATION

Juris Doctor, University of Texas School of Law

Bachelor of Arts, Speech Communication, University of Illinois

Phi Beta Kappa

BOARD & PROFESSIONAL LEADERSHIP

- Executive Committee Member, National Association of State Retirement Administrators (NASRA) (2025)
- Advisory Board Member, Georgetown Center for Retirement Initiatives (2016–2025)
- President, Association of Illinois Public Retirement Systems (2019–2021)
- Trustee Leadership Forum, Racial Justice in Investment Cohort (2020–2021)
- Corporate Affiliate Board Member, National Association of State Treasurers (2008–2011)
- Board Member, Illinois State Board of Investment (2003–2007)
- Board Member, Illinois Judges Retirement System (1999–2021)