



## **EXPERIENCE YOU CAN COUNT ON**

Our firm will work with you to identify your objectives and the services needed for success. We agree to project metrics, deliverables, timelines and costs. That's how we ensure you meet your objective.

*Our mission is to provide independent, objective consulting to help our clients design and deliver successful retirement programs.*

Our firm's founder and CEO, Stacy L. Schaus, has over three decades of experience in the defined contribution and financial services industry. She started her career in 1981 at Merrill Lynch, working on Wall Street in investment banking, research, strategic marketing and corporate strategy. In 1989, she joined Hewitt Associates in Lincolnshire, Illinois initially as an executive compensation consultant and then went on to build Hewitt's defined contribution, personal finance and brokerage businesses. She returned to her home state of California in 2006 and joined PIMCO to build their defined contribution practice, including product positioning, consultant relations and thought leadership. In January 2019, she launched Schaus Group LLC to provide independent consulting to plan sponsors and providers.

Ms. Schaus is a noted speaker and prolific writer, including publishing 11 books on defined contribution. Two of her books are in Wiley's corporate finance series: *Designing Successful Target-Date Strategies for Defined Contribution Plans* (2010) and *Successful Defined Contribution Investment Design* (2017) <https://www.amazon.com/s?field-keywords=schaus+gao>.

Ms. Schaus holds an MBA in Finance/International Business from NYU Stern and an undergraduate degree from University of California at Santa Barbara. She is a certified financial planning professional. She is the current chair of the Employee Benefit Research Organization and the past founding chair of the Defined Contribution Institutional Investment Association. She also is a former board member for the Financial Planning Association. Ms. Schaus also serves on the editorial board for the *Journal of Retirement* and the *Retirement Management Journal*.