

PROFESSIONAL HIGHLIGHTS

- Hands-on senior U.S. retirement and financial services executive leader with extensive experience in project management, business analysis, and new client implementations.
- 30 years of U.S. retirement plan financial services and project management experience.
- Significant familiarity with all major retirement markets and segments.
- Oversaw numerous client implementations to new recordkeeping platforms, including plan document reviews.
- Significant knowledge of industry trends, legislative and regulatory initiatives, and operational best practices.
- Strong technical, compliance and operational acumen.
- Proven ability to develop and manage teams of professionals.

PROFESSIONAL EXPERIENCE

Sales and Book of Business Analysis

January 2024 to Current

Consultant

- Independent review and analysis of multiple clients' books of business and historical sales data
- Identify business trends and potential new business opportunities.

Customer Experience (CX) Competitive Assessment

November 2023 to December 2023

Consultant

- Independently reviewed and evaluated capabilities of retirement provider and insurance company customer experiences including:
 - Login and security protocols.
 - Educational resources, tools and education.
 - Presentation of internal and external account information.
 - Mobile application experience relative to web experience.
- Conducted survey of customer experience with customers.
- Analyzed, summarized, and scored customer experiences based on client-specified criteria.

Multinational Financial Services Organization

February 2023 to December 2023

Consultant

- Subject to a Non-Disclosure Agreement governing the name of the Organization and specifics related to the project.
- Lead a team of 8 business analysts responsible for the review and development of recordkeeping and administration operational process flows.
- Evaluate tools and systems that may be transitioned to the new recordkeeping provider.
- Support the development of the 'future state' service model.

Broadcast Retirement Network

January 2019 to Current

Chief Executive Officer / Lead Anchor

- Built and supported the Broadcast Retirement Network, the first streaming educational platform focused on financial security and independence.
- Building and managing content creation accuracy, data transmission via internet protocols, and compliance preparation.

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- Developed business requirement documentation (BRD) based on network connectivity requirements with senior management.
- Built data technical specs and implemented data sharing between over 100 streaming and smart TV platforms.
- Worked directly with corporate compliance representatives to ensure content met stringent regulatory requirements and was accurate.
- Collaborated with internal technical, operational, and communication specialists on content creation, data distribution, and compliance acceptance.
- Conducted and managed user acceptance testing (UAT) with internal and external customers.
- Resolved all technical issues at different stages of the project including video, audio, and data stream transmission via TCP/IP protocols.
- Established algorithmic measurement tools and parameters to provide reporting to sponsors and advertisers on content performance.

S&P Dow Jones Indices

January 2018 to March 2021

Consultant

- Evaluation of the Environmental, Social and Governance opportunities in the U.S. defined contribution marketplace and facilitated and analyzed recordkeeper data.
- Conducted DC recordkeeping ESG penetration data analysis.
- Conducted analysis of recordkeeper ESG product adoption in 401(k)s and retirement accounts
 - Provided intelligence on passive ESG investing trends, overall appetite, and potential obstacles to the adoption of ESG strategies.
 - Provided a high-level description of ESG investing options available on recordkeeper platforms, including white labeled solutions, mutual funds, and CTs.
 - Provided an overview of decision factors that were influencing recordkeeper, asset owner, and investment consultant decision makers within an ESG framework.
 - Prepared the BRD that would be shared with asset managers and recordkeepers interested in a potential IP partnership for S&P500 ESG MFs or CTs.
 - Provided a high-level overview of ESG adoption in the US, including size and general trends.
- Tasked with development of the ESG commercial roadmap in DC retirement plans
 - Identified and recommended 5-8 market participants (recordkeepers / asset managers) to engage with the BRD as potential IP partners for the S&P500 ESG Index.
 - Managed the BRD process, prepared collateral materials, and created a value proposition tailored to the potential S&P500 ESG IP partners.
- Led, supported, and analyzed the client's defined contribution retirement initiatives, including data receipt and transmission from investment managers and recordkeepers.
- Performed retirement marketplace analysis:
 - Provided a high-level definition of the retirement market in the US, covering areas such as size, general trends, and investments trends (including ESG and factor investing).
 - Provided intelligence on general passive investing trend in the retirement market, the overall appetite and the potential obstacles to passive investing.
 - Provided a high-level description of the different types of asset owners and their approach to investing retirement assets (white label, consultants driven, in house investing etc.).
 - Defined a high-level target audience to include all other market participants (i.e., consultants, service providers, platform providers, asset managers).
 - Further defined (within the organizations identified) the market participants involved in the index selection process and their role in the process.
 - Provided an overview of decision factors influencing the decision makers. Within passive investing, defined the factors that would steer decision to passive investing solutions.
- Developed a commercial roadmap to be used over the next five (5) years.

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- Based on the SPDJI existing offerings, defined a broad focus list for the retirement marketplace.
- Provided a high-level overview of opportunities and threats arising from the increasing demand for passive target date offering, OCIO services, and focus on decumulation.
- Defined potential market opportunities for SPDJI Target Date indices and STRIDE.
- Defined potential opportunities and market positioning for the S&P Target Tuition Inflation Index and S&P US Retiree Spending Index.
- Explored and recommended commercial strategic partnerships. Should S&P explore partnerships with asset managers and service providers to further market penetration? Defined the type and scope.
- Defined resources needed to implement the strategy and the gap in the firm's current resources.
- Brand building development: Provided a roadmap to building a strong retirement brand for SPDJI including:
 - Marketing of current offerings (including Target Date and STRIDE indices).
 - Membership in industry associations, conferences, forums, webinars, blogs, advertising, PR, etc.
 - Provided a roadmap of how SPDJI could become an independent forum for thought leadership on advancing retirement and retirement income design / solutions.

Cammack Retirement Group (now part of CAPTrust)

November 2012 to December 2017

National Public Practice Leader

Project Summary: Lead and develop a National public-governmental consulting practice ■ Creator, Booker, Executive Producer and Host of Staying Ahead of the Curve, a ground breaking show to distribute retirement and financial industry thought-leadership to the marketplace ■ Provide defined contribution consulting advice (plan design, communications and education, best practices and investment oversight) to plan sponsors ■ Oversee and manage a team to produce quarterly reports, all client deliverables and respond to client service needs ■ Identify new business and marketing opportunities ■ Evaluate and negotiate terms on behalf of clients ■ Publish articles and white papers and participate in regular media interviews

- Worked directly with the recordkeeping platform information technology and operations staff for the top 20 U.S. recordkeepers.
- Created BRDs to ensure services requested by the client were properly documented and adhered to during transition.
- Provided onsite support at recordkeeper location during data transfer and system set up to ensure porting of data and job processes and commitment to agreed upon timeline.
- Oversaw the transfer of 500,000 participant and activity records and over \$25 billion in assets between recordkeeping / custodian platforms.
- Conducted site visits during projects to understand information technology, compliance, and operations staff support as well as evaluated cybersecurity protocols.
- Participated in UAT weeks prior to 'go-live' data on all processes including data element and investment mapping, web / voice response unit, statements, mobile and customer call center.
- Ensured plans were in compliance with all plan provisions and ERISA.
- Reviewed participant / member communications to ensure message accuracy.

USI Consulting Group

March 2011 to October 2012

Vice President and Senior Consultant

- Provided defined contribution consulting advice to plan sponsors.
- Oversaw client transitions and implementations between recordkeepers.

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Segal Advisors, Inc. (now Segal Marco Advisors)
Investment/Retirement Plan Search Consultant

February 2008 to March 2011

- Conducted defined contribution and defined benefit service provider searches.
- Drafted and maintained investment policy guidelines.
- Performed ongoing investment performance monitoring.
- Oversaw client transitions and implementations between recordkeepers.

SunGard EBS Consulting and Professional Services, Inc.
Senior Project Manager/ Business Analyst

September 2006 to February 2008

- Managed implementation of new recordkeeping system for major defined contribution service providers.
- Interacted with senior members of organization's business and information technology staff to review project objectives and review current business processes.
- Created detailed technical, functional, and business requirements design documents.
- Provided delivery management to ensure customer satisfaction and reference ability.
- Was responsible for delivery of training to client staff.

T. Rowe Price Retirement Plan Services, Inc.
Sr. Retirement Plan Coordinator

April 1999 to September 2006

- Serviced national clients with retirement plans.
- Advised clients on plan administration and plan design "best practices".
- Participated in plan conversions and new plan implementations.
- Conducted plan document and record keeping system research and analysis.
- Executed investment lineup changes.
- Mentored, trained, and developed new associates.

Pollard & Associates, Inc.
Benefits Administrator

February 1997 to April 1997

- Performed plan valuations for defined contribution and defined benefit retirement plans.
- Completed annual plan filings and government forms.
- Managed corporate Novell and Windows NT network.

EDUCATION

- University of Baltimore, Masters of Business Administration; Concentration: Finance
- Hofstra University, Bachelors of Business Administration; Concentration: Management Information Systems