



## Mark Simser, CFA®

### Regional Director - Nonqualified Plans

West Region - serving AK, AZ, CA, CO, HI, ID, KS (Kansas City only), MN, MO (Kansas City only), MT, ND, NV, OR, SD, UT, WA, and WY

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### Who I am and how I can help you

In my role as a regional director with nonqualified deferred compensation plans, I support financial professionals and employers in the sales and service of these plans to organizations. The deferred comp benefits we provide to clients help them recruit, reward, retain, and retire key employees. And research shows that both employers and key employees value this benefit for a variety of reasons.<sup>1</sup>

I can help with plan design, financial analysis, implementation, and delivery of deferred comp solutions. I'll work to simplify complex ideas and, with the financial professional, help put a solution in place to meet the employer's needs. I work closely with Mike Roesler, regional vice president of nonqualified plans, to support financial professionals and their clients in the West region.

I've been in the financial services industry since 1993 and have been with Principal® since 2008. I have a degree from the University of St. Thomas in St. Paul, Minnesota and hold the Chartered Financial Analyst® designation. I live in Shoreview, Minnesota with my wife and three sons. I'm active in my community and have served on the boards of the local baseball and hockey associations, as well as keeping busy coaching and watching my sons' games.

### More about the company I work for

Principal is a leader in global investment management and retirement services with decades of experience and the No. 1 provider of nonqualified deferred comp plans<sup>2</sup>. We help people and organizations around the world build, protect, and advance their financial well-being through retirement, insurance, and asset management solutions that fit their lives. Our employees are passionate about helping clients of all income and portfolio sizes achieve their goals—offering innovative ideas, investment expertise, and real-life solutions to help make financial progress possible. To find out more, visit us at [principal.com](https://www.principal.com).

<sup>1</sup> 2022 Principal® Trends in Nonqualified Deferred Compensation report.

<sup>2</sup> Based on number of NQDC plans (excluding 457 plans), 2022 *PLANSPONSOR* Defined Contribution Recordkeeping Survey, July 2022.

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