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Regional Vice President - Nonqualified Plans

Southeast Region - serving AL, AR, FL, GA, LA, MS, NC, SC, and TN

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Who I am and how I can help you

In my role as a regional vice president-nonqualified plans, I support financial professionals and employers in the sale and service of nonqualified deferred compensation plans to organizations of all types and sizes. 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.¹

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. My senior consultants, Wes Wester and Lindsay Jones, two senior internal wholesalers, Monica Zamora and Susan Fickling, and I provide support to financial professionals and their clients in the Southeast region.

I've been in the financial services industry since 1985, with a specific focus on corporate retirement plan development. I started my career with Principal® after graduating college and have held a variety of positions, including being a partner in the deferred comp firm Principal acquired in 2001.

I have a bachelor's degree in business administration from the University of North Carolina. In addition, I hold advanced designations from The American College and the Wharton School of the University of Pennsylvania. I've been recognized by Principal as National Top Producer and served as Vice President and President of the local International Society of Certified Employee Benefit Specialists. I live in Florida with my wife, where I'm active in competitive tennis and water sports.

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 plans². 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 experience, and real-life solutions to help make financial progress possible. To find out more, visit us at [principal.com](https://www.principal.com).

¹ 2023 Principal® Trends in Nonqualified Deferred Compensation report.

² Based on number of NQDC plans (excluding 457 plans), *PLANSPPONSOR* Defined Contribution Recordkeeping Survey, July 2023.

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