

**Roger C. Kostmayer's** entire career has been in financial services as an executive and consultant. He was part of the team that made Aetna (now Aetna/ING) a retirement industry leader and was recruited to SunAmerica as president of its national broker/ dealer and vice president of sales. He helped develop a new generation of investment and annuity products and opened the securities industry distribution channel. Roger was a founder, executive vice president, and chief marketing officer of The Copeland Companies, now CitiStreet Retirement Services, a firm with approximately \$200 billion in assets.

Roger has been one of the preeminent financial services consultants and recruiters for twenty years. He is a member of NAVA and a former NASD principal.

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**Matthew C. Kostmayer's** brings strong marketing, sales, and consulting experience to bear. He joined the firm after managing a portfolio of financial services, manufacturing, and health care clients for Columbia Consulting Group. The majority of his responsibilities were in the financial services industry and specifically focused on the asset management, investment banking, and insurance sectors. Matt's knowledge of consulting and research is complemented by his having obtained NASD, Life and Health licenses. Earlier he worked on Capital Hill in a U.S. Congressional office. Matt is based in the Baltimore/ Washington area.

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