

## Scott T. Steves, CFP®

*Regional Sr. Vice President*

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### Professional Experience

Mr. Steves joined the Gallagher retirement plan consulting team with over 20 years of financial services experience encompassing retirement plan and pension management services, health & welfare services and property & casualty risk management.

A former principal of Southwest Business Consultants, Inc. and the founder of The Steves Financial Group, Inc. (SFG), Mr. Steves has personally owned and managed two independent advisory firms since 1991. For 15 years, SFG provided full risk management services. In May 2008, Mr. Steves formally merged with the Arthur J. Gallagher & Co. group of companies.

Mr. Steves serves AJG as the South Central's Regional Sr. Vice President and Regional Team Manager, providing management and oversight to the regional sales and service team providing expertise in the research, development, implementation and management of qualified retirement programs for over 200 clients. Scott also serves on the Gallagher Energy Niche management team, providing specialized consulting services to the South Central Region's large energy sector, as well as representing other industry niche markets and program plan sponsors in all industries across the country.

Mr. Steves' consulting specialties and primary focus includes retirement plan analysis, document compliance, IRS, DoL and ERISA compliance, investment management and Named Fiduciary services under ERISA Sec. 3(21), vendor RFP & fee benchmarking analysis, full fiduciary mitigation management and ongoing plan sponsor representation and management. Health & welfare services, non-qualified programs and property & casualty risk management services are also areas of experience provided by Mr. Steves and are referred accordingly to appropriate team partners within the Arthur J. Gallagher group of companies.

### Professional Designations:

CERTIFIED FINANCIAL PLANNER™ Professional (CFP®)

### Years Experience:

20 +

### Education:

Bachelor's degree in Economics from The University of Texas at Austin.

Certified Financial Planner® certification from The University of Houston College of Business Administration School of Executive Development

### Specializes in:

Design, implementation, and monitoring of qualified retirement plans