



Shelly Horwitz, AIF®, CPFA™
Managing Director
Pensionmark

Shelly is a retirement plan expert with over 25 years of experience devoted solely to retirement plan management. Over her career she has provided consulting and fiduciary advisory services to non-profits, private and public corporations in primary focus areas such as fiduciary governance, plan design, investment consulting, compliance, employee education and communication. Shelly leads the team in Atlanta, G.A. and Washington, D.C. and works with clients all over the U.S. and Canada.

Shelly began her financial services career for one of the top-retirement plan recordkeepers, where she held several client relations and leadership roles. She has been working as an advisor and consultant for the last 12 years and works with both private, public and not for profit organizations ranging in size and industry. She has spoken at many industry and client conferences on a variety of topics, including fees, benchmarking and financial wellness. Shelly became a managing partner of Pensionmark with a focus on expanding the footprint in corporate, discretionary investment management and master trust space.

Shelly is a founding member of the National Association of Plan Advisors (NAPA) and a current member of the Society for Human Resources Management (SHRM) and the American Society for Association Executives (ASAE). She was named a Top Women All-Star in 2015-2023 by the National Association of Plan Advisors.

Shelly is a graduate of Elon University with a B.A. in Psychology and has earned the Accredited Investment Fiduciary (AIF®) from the Center of Fiduciary Studies (FI360) and the Certified Plan Fiduciary Advisor (CPFA)™ from the National Association for Plan Advisors (NAPA) and is currently working towards her Certified Financial Planning (CFP) designation. She holds her FINRA Series 7 and 65 securities licenses, as well as Life, Annuities and Long-Term Care insurance licenses.



James D. Vanke, CPA, AIF®
Behavioral Finance & Financial Wellness Specialist
Pensionmark

James Vanke has over 25 years of financial sector experience ranging from advising some of the world's largest companies with a "Big 4" CPA firm to serving small- and mid-sized companies in a boutique environment.

At Pensionmark, James is responsible for helping employers build and manage successful retirement benefits. He is an advocate and fiduciary partner who helps clients with fiduciary risk management, investment selection and monitoring, vendor relationships, plan operations, cost controls, and tax savings. As a behavioral finance and financial wellness specialist, James believes that we can help employees make positive financial decisions that lead to sustainable financial habits that pay dividends in the workplace.

James holds a master's degree in accounting and a bachelor's degree in business administration from The University of North Carolina at Chapel Hill. He is a Certified Public Accountant and Accredited Investment Fiduciary.



Rob Appleman, AIF®, CPFA™
Director of Investment and Client Services
Pensionmark

Rob brings over 20 years of relationship management, investment advisory and institutional industry experience. As Director of Investments and Client Services, Rob accesses and ensures plan sponsors' fiduciary needs are met efficiently and produce superior outcomes through the delivery of investment oversight and plan consulting solutions.

Rob earned his BA degree in Finance from the James M. Hull College of Business at Augusta University. In addition, he earned the Accredited Investment Fiduciary® (AIF®) designation from the Center for Fiduciary Studies (Fi360) and the Certified Plan Fiduciary Advisor (CPFA™) designation from the National Association of Plan Advisors (NAPA).