



**Derek Fiorenza CFP®, ChFC®, C(k)P®, CPFA
AIF®, PPC™, MSBA**
Chief Operating Officer/ Chief Commercial Officer
Summit Group Retirement Planners, Inc.

Derek co-founded Summit Group Retirement Planners, Inc. (SGRP). SGRP is a Registered Investment Advisory Firm (RIA) registered with the Securities Exchange Commission (SEC). He serves as an Investment Advisor Representative (IAR) of the RIA, while also being responsible for the firm's compliance as the COO/CCO of the corporation. He is focused on expanding the Summit Group brand by providing an extremely high level of service to all qualified corporate retirement plan clients and the industry as a whole.

Derek founded the non-profit organization, Fiorenza's Food for Friends (F4) as a 501(c)(3) non-profit organization in 2011. F4's Vision is to create a world without hunger! F4's Mission is to connect sources of food to recipients in need. www.f4service.org

He also serves as the Chair for the FinLitFuture\$. FinLitFuture\$ is a collaborative initiative founded and developed by the Retirement Advisor Council (RAC). FinLitFuture\$ believes that by advancing financial education for the youth we can influence improved financial wellbeing success and stronger retirement security for future generations. The FinLitFuture\$ Initiative is fiercely dedicated to supporting, organizing, and inspiring the collective volunteer and advocacy efforts of financial advisors, service providers, asset managers, and retirement industry associations who share a commitment to advancing financial education in schools and community programs.

Passion Statement

"It's my sole focus to become the best version of myself in all areas of my life so that I can live, give, serve, love, and educate others with humble confidence. I truly want to make the world a better place for all, and I have dedicated my life to empowering my clients with financial coaching while striving to improve communities in need around the country through my philanthropic endeavors."



Anthony Fiorenza CPFA, AIF®, C(k)P®, PPC™
CEO/President
Summit Group Retirement Planners, Inc.

Anthony Fiorenza earned a Bachelor of Science in General Program from Villanova University, and a Master of Arts in Psychology from West Chester University of PA.

At Summit Group Retirement Planners, Inc., he consults with employers (for profit companies and non-profit organizations) on the establishment, design features, communication, continued investment monitoring, administrative oversight and ongoing engagement with the Investment Committee and the plan participants for their qualified and non-qualified retirement plans. As an Investment Advisor Representative with Summit Group Retirement Planners, Inc., he delivers wealth management advisory services to individual clients, designing and implementing investment strategies in response to their objectives, time horizon and risk tolerance.

Anthony was a member of the Bishop Shanahan High School Advisory Board, while also serving as the chairman of the Business Tax Credit Program at Bishop Shanahan High School. He previously also served on the EITC Committee for the Foundation for Catholic Education. Anthony has earned the AIF® Designation, NAPA CPFA, PPC Designation, and C(k)P Designation. Anthony Fiorenza is in affiliation with Summit Group Retirement Planners, Inc. and he is a member of the National Association of Plan Advisors (NAPA).



Linsey Vail Clark

Chief Borrower Advocate

Savi

Lindsay Vail Clark is Savi's Chief Borrower Advocate, and one of the nation's leading voices on student loan policy and financial empowerment. She has addressed audiences across the country—from Capitol Hill and national conferences to employer benefits teams and individual borrowers—breaking down the complexities of the federal student loan system and fiercely advocating for its improvement. Since joining Savi's founding team in 2018, Lindsay has been instrumental in shaping the company's mission to ensure every borrower can access the relief they've earned. Serving first as Director of Partnerships and then as Director of External Affairs, she has driven outcomes that saved consumers millions of dollars and built Savi into the nation's foremost student loan benefits provider.

Before dedicating her career to the student loan crisis, Lindsay built more than a decade of experience forging strategic national partnerships that deliver measurable social impact. She served as the inaugural Executive Director of the Concordia Summit, a global enterprise convening foreign leaders and heads of state to advance private-public collaboration. She later joined the Private Investments Group at Two Sigma, a quant-tech hedge fund where she developed a passion for mission-driven startups. The Financial Technology Report named her one of the Top 25 Women Leaders in Financial Technology in 2022, and her expertise has appeared in numerous publications, including the WSJ, CNBC, Newsweek, MarketWatch, and The Nation. She holds a B.A. in Political Science from Yale University and a Master's of International Affairs from Columbia University.

Jim Dowling, CFA®

Senior Vice President

Fidelity Investments

Jim Dowling is a senior vice president in the Intermediary Investment Client Group within Fidelity Institutional®. Fidelity Institutional is a division of Fidelity Investments that offers investment insights, strategies, and solutions, as well as trading services to a wide range of wealth management firms and institutional investors. Fidelity Investments is a leading provider of investment management, retirement planning, portfolio guidance, brokerage, benefits outsourcing, and other financial products and services to institutions, financial intermediaries, and individuals.

In this role, Mr. Dowling is a Defined Contribution Investment Only (DCIO) wholesaler based in Washington, DC. He is responsible for the distribution of Fidelity Investment's asset management capabilities through advisors, advisory firms, and record keepers. Mr. Dowling supports his clients by representing Fidelity's investment capabilities, investment thought leadership, capital markets perspectives, investment analytics, and retirement thought leadership.

Mr. Dowling joined Fidelity Investments in 2000 and began his institutional wholesaling career with Fidelity in 2003 in the mid-Atlantic region.

Mr. Dowling earned degrees in economics and English from James Madison University and a master of business administration degree from the McDonough School of Business at Georgetown University. He also holds the Financial Industry Regulatory Authority (FINRA) Series 7, 63, and insurance licenses, and is a CFA® charterholder.

The Chartered Financial Analyst (CFA) designation is offered by the CFA Institute. To obtain the CFA charter, candidates must pass three exams demonstrating their competence, integrity, and extensive knowledge in accounting, ethical and professional standards, economics, portfolio management, and security analysis, and must also have at least four years of qualifying work experience, among other requirements. CFA® is a trademark owned by CFA Institute.

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