



William Beale, AIF
President
Beale Financial Group

In 2001, Mr. Beale was hired to create and lead a Defined Contribution consulting division within an insurance brokerage in Pittsburgh, Pennsylvania, called Henderson Brothers. During his tenure, he successfully built and managed a highly regarded practice with the following accomplishments:

- **330 qualified plans** under advisement
- **3(38) Fiduciary** for more than **\$4.5 billion** in advisory qualified plan assets
- **3(38) Fiduciary** for over **\$240 million** in advisory assets under management within the firm's investment models
- **Chair**, Institutional Investment Committee
- **Chair**, Personal Wealth Management Investment Committee
- Team nominated for **PLANSPONSOR Magazine's "Adviser of the Year" Award** every year since **2006**

In January 2024, Mr. Beale relocated to Palm Beach Gardens, Florida, and founded **Beale Financial Group, LLC**, a new practice dedicated to Defined Contribution plan consulting.

Licenses and Designations

- Series 7, 6, 63, 65
- Life, Health, and Accident
- Accredited Investment Fiduciary® (AIF®)
- Healthcare Fiduciary Coach



Meet Marc Howell FSA*, EA*

As a Managing Director – Enhanced Plan Design, I work with defined contribution plans, defined benefit plans, equity compensation programs, non-qualified plans, student loan programs, retention bonus plans, and more. I have consulted on design of programs for organizations coast to coast and have been recognized for the way my designs influence employee and employer outcomes.

I will work with you and your clients to provide input on program design that helps ensure the overall program delivers the best possible benefits for their employees, while also delivering benefits to your client’s own business focusing on groups of employees who may be more difficult to recruit and retain.

I am co-inventor on a patented capability on predictive modeling using big data analytics, was recognized as one of the top 25 Rising Stars of Retirement under 40 by LIMRA in 2017, and awarded as a Leader in Retirement by Defined Contribution Institutional Investment Association (DCIIA) in 2025.



Experience

- 25 years in the industry
- 3 years with Principal



Designations*

Fellow of the Society of Actuaries (FSA)
Enrolled Actuary (EA)



Registrations

Series 6, 26, 63



Education

BS in Economics from The University of Pennsylvania, Wharton School of Business

Graduated as Joseph Wharton Scholar



Marc Howell FSA* EA*

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*Defined benefit measurements, if applicable, are for the sole purpose of providing the plan sponsor information with respect to their plan or plans evaluated. Related analysis presented is/will be completed based on the plan’s participant data, provisions, and actuarial assumptions and methods incorporated into the DB plans most recent funding and/or accounting measurements. Analysis using different information and at future measurement dates may differ significantly from the current analysis.

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