



Shelly Horwitz, AIF®, CPFA™
Managing Director
World Investment Advisors

Shelly is a retirement plan expert with nearly 30 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 15 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 World Investment Advisors with a focus on expanding the total rewards footprint for organizations headquartered in the US and around the globe.

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.

She has been named the state captain for the delegate to the National Association of Plan Advisors' (NAPA) DC Fly-In Forum, an exclusive gathering of the nation's leading retirement plan advisors. As a NAPA DC Fly-In Forum delegate she has met annually in Washington, D.C. to listen to and brief top congressional leaders about the importance and future of the nation's workplace retirement plans, and, as an advocate for the employers and participants he works with and share how proposed laws and regulations might impact American workers' retirement security.

Shelly 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.



Michael Morris, CRPS, NQPA, C(k)P®
Managing Director
World Investment Advisors

Michel has extensive experience with over 30 years in the financial services industry. He brings a unique perspective and has spent the majority of his career working for some of the largest retirement plan providers and nationally recognized consulting groups and have consulted on hundreds of retirement plans. As a result, the breadth and depth of knowledge includes all aspects of defined contribution, defined benefit and non-qualified plans. Michael has a passion and deep expertise in helping plan sponsors and participants address their pre and post-retirement needs

Michael has been recognized as a "401 Top Retirement Plan Advisor" by the Financial Times 2017, 2018 & 2019. In addition, he has been cited in the article "Who the Best Advisors Are" by PLANSPONSOR Magazine and repeatedly named a "Top 300 influencer" by the DCPI.

Michael holds the Non-Qualified Plan Administrator (NQPA), Chartered Retirement Plan Specialist (CRPS®), and the Certified 401(k) Professional (C(k)P) designations. He is a founding Lecturer of The Retirement Advisor University (TRAU) a collaboration with UCLA Anderson School of Management Executive.

Over the past 7 years Michael has been selected as a delegate to the National Association of Plan Advisors' (NAPA) DC Fly-In Forum, an exclusive gathering of the nation's leading retirement plan advisors. As a NAPA DC Fly-In Forum delegate he meets annually in Washington, D.C. to listen to and brief top congressional leaders about the importance and future of the nation's workplace retirement plans, and, as an advocate for the employers and participants he works with and share how proposed laws and regulations might impact American workers' retirement security.

The Financial Times 401 Top Retirement Plan Advisors is an independent listing produced annually by the Financial Times (September 2017, 2018 & 2019) and is based on data gathered from advisors, regulatory disclosures, and the FT's research. The 401kWire's 2011 300 Most Influential DC Advisors is a list based on nomination and votes as well as input from distributors working with the advisors, and an analysis of objective criteria including statistics about the advisors' practices gathered directly from the nominees.



James D. Vanke, CPA, AIF®
Managing Director
World Investment Advisors

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 World Investment Advisors, 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™
Vice President Client Services
World Investment Advisors

Rob brings over 20 years of relationship management, investment advisory and institutional industry experience. Rob leads the service team in Atlanta, as well as being responsible for direct client relationships for a variety of industries. His client work includes assisting plan sponsors to meet their fiduciary responsibilities, including 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)



T. Rowe Price

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Patrick Delaney

Insights Director



U.S. INTERMEDIARIES • ADVISOR ENGAGEMENT • RETIREMENT & PRACTICE MANAGEMENT

ABOUT

Patrick Delaney is an Insights Director within T. Rowe Price's U.S. Intermediaries - Advisor Engagement organization. His work helps financial professionals understand and respond to the evolving face of wealth in the United States.

He joined T. Rowe Price in 2000, beginning his career in Retirement Plan Services. Before moving into his current role, Patrick developed and delivered practice-management content designed to help financial professionals strengthen their businesses and better serve corporate retirement plan clients.

Patrick brings extensive experience in advisor engagement, retirement-plan services, and practice management, with a career at T. Rowe Price spanning more than two decades.

EDUCATION

B.A. in Economics

Gettysburg College, 1999

CREDENTIALS

- **Series 7** Registered representative
- **Series 63** Registered representative
- **Broker-Dealer** State registered

AT A GLANCE

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YEARS AT
T. ROWE PRICE

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YEARS OF
INVESTMENT EXPERIENCE

AREAS OF FOCUS

- Advisor engagement
- Retirement plans
- Practice management
- Changing wealth landscape