

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

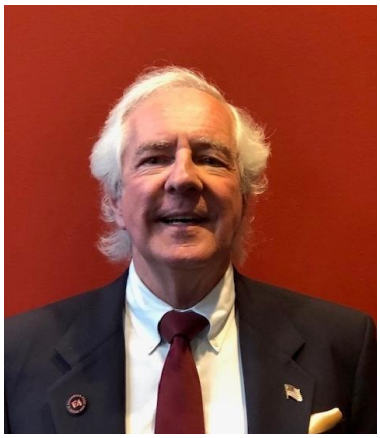
Derek co-founded Summit Group Retirement Planners, Inc. (SGRP). SGRP is a Registered Investment Advisory Firm (RIA) registered with the Securities Exchange Commission (SEC). He serves as an Investment Advisor Representative (IAR) of the RIA, while also being responsible for the firm's compliance as the 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."

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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).

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Sue Walton

Sue Walton is a senior retirement strategist at Capital Group. She has 28 years of industry experience and has been with Capital Group for 10 years. Prior to joining Capital, Sue was a director at Towers Watson Investment Services. Before that, she was an investment consultant at Mercer Investment Consulting and Ellwood Associates. She holds an MBA from DePaul University with a concentration in finance and a bachelor's degree in business administration, economics and international business from Marquette University. Sue is based in Chicago.