



BRAD MARZANO

Senior Client Manager

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ABOUT ME

I am a rare lifer in the industry, having spent over 20 years in Retirement Plan Services. What I enjoy the most is connecting with clients, learning about their business, and helping their employees understand the importance of saving for retirement. I want Plan Sponsors to know that I will focus on their Plan, so they can focus on running their business.

LIFE PHILOSOPHY

Do what is right and you can't go wrong .

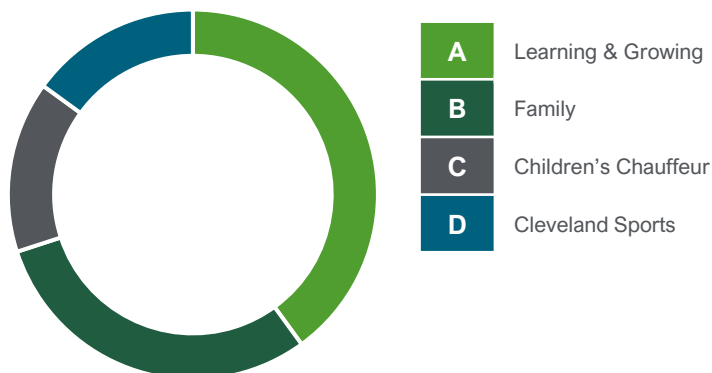
PROFESSIONAL STRENGTHS

- Listening
- Oversight
- Responsiveness
- Service
- Empathy

PERSONAL STRENGTHS

- Easy Going
- Generosity
- Kind
- Humor

WEEK IN THE LIFE



EXPERIENCE

Senior Client Manager

Oswald Financial, Inc.

2021 - present

I serve as the Plan sponsor's dedicated service contact to identify, strategize, convey, and execute efficient retirement benefit solutions to that strive to reduce fiduciary risk.

Vice President, Relationship Manager

Huntington National Bank

2017 - 2020

Primary contact for Plan Sponsors, servicing retirement Plans while working alongside other practices of the bank in order to meet client needs.

Client Service Manager

Charles Schwab

2001 - 2017

I held roles within Participant Services and Client Services, with the majority as a Client Services Manager serving as primary contact for large market retirement Plans.

EDUCATION

Bachelor of Arts, Marketing Management

Youngstown State University

COMMUNITY INVOLVEMENT

Volunteer

Wadsworth Grizzly Community Foundation

Volunteer

Medina County Economic Development

Volunteer

Akron Roundtable

PROUD OF

My Big, Chaotic Family