



CAFARO
GREENLEAF



Jamie Greenleaf AIF®, CBFA, C(k)P®, CHSA Lead Advisor, Principal

A RECOGNIZED EXPERT IN THE RETIREMENT PLAN INDUSTRY,

Jamie has been with Cafaro Greenleaf since 1993 and a principal since 1997. She has been a recognized vice president and retirement plan advisor with UBS Financial and with Prudential Securities, consistently ranking among the top retirement advisors nationally at both firms.

Jamie is regularly invited to speak at industry conferences and is a sought after presenter for many other advisor and plan sponsor continuing education sources such as Pensions and Investments, HR.com, and SHRM University Conference Services. Jamie serves on the Advisory Boards of Prudential, and John Hancock, as well as the Leadership Council for the National Association of Plan Advisors (NAPA), where she regularly provides her retirement plan expertise and experience to our nation's regulators and policymakers in Washington DC.

Jamie has spent her entire professional career helping retirement programs and public funds. She has provided consulting services in all areas of plan management and oversight, including plan design, fees and services benchmarking, investment management selection and monitoring, fiduciary and regulatory compliance, investment policy design, and financial education to many Fortune 500 and publicly traded companies, nonprofit entities and public agencies.

She is an adjunct lecturer in the Plan Sponsor University certification program for UCLA's Anderson School of Business-Executive Education. Greenleaf holds a BA in Business Administration from Delaware Valley College, is a Registered Financial Advisor and is Life insurance licensed. Jamie is also is a Registered Investment Advisor representative and holds series 7, 26, and 63 licenses.

Jamie is known for her extensive and unparalleled knowledge, expertise and passion for the industry. She has a keen ability to guide, support and educate plan trustees, plan sponsors and plan participants alike. Leading from our headquarter office in Red Bank, New Jersey, Jamie advises throughout the New York Metropolitan and TriState areas, traveling to other regions of the country when the opportunity to serve arises. Jamie currently resides in Rumson, NJ with her husband and 2 sons.

AWARDS, RECOGNITIONS & ACCOMPLISHMENTS

Most Influential People in Retirement

- *The 401kWire*

25 Most Influential Women in Benefit Advising (2016 & 2017)

- *Employee Benefit Adviser (EBA)*

Top 100 Retirement Plan Advisors

- *Planadviser*

Top 401 plan advisors nationally (2016 & 2017)

- *Financial Times*

New Jersey Leading Woman Entrepreneur

- *Leading Women Entrepreneurs and Business Owners Initiative*

Top Women Advisors (2016 & 2017)

- *National Association of Plan Advisors (NAPA)*

Most Influential Women in Benefit Advising (2016)

- *Employee Benefit Adviser*

Advisor of the Year Award for Plan Design & Administration (2016)

- *SPARK Institute*

Accredited Investment Fiduciary® (AIF®) professional designation

- *Center for Fiduciary Studies*

Certified Behavioral Finance Analyst (CBFA) designation

- *Center for Behavioral Finance*

Certified 401k Professional® (C(k)P®) designation

- *The Retirement Advisor University (TRAU)*

Leadership Council Member

- *National Association of Plan Advisors (NAPA)*

Certified Health Savings Adviser

- *Access Point HSA*