

FOR IMMEDIATE RELEASE

Definiti Appoints New Sales and ERISA Leadership

FIRM ADDS STRENGTH IN HIGH-IMPACT ROLES

HOUSTON (January 17, 2024) – Definiti, a national leader in retirement services, today announced the appointment of Richard Frink as Head of Sales and Betsy Schaaf as ERISA Counsel.

As Head of Sales, Frink will direct the firm’s regional sales and strategic accounts team. He and his team will work closely with the financial advisor community and Definiti’s recordkeeping partners to deliver tailored retirement plans to organizations across the country. He’ll draw on his strong background in retirement sales, most recently as Head of Corporate 401(k) Sales with Equitable.

“Rick impressed us with his expertise, focus on building strong relationships, and passion for retirement services. He’s built and led large national sales teams, helping drive significant growth at Equitable. I’m confident he’ll make terrific contributions to our company,” said Tom Gaillard, CEO at Definiti.

“I’m excited about the opportunity to leverage Definiti’s outstanding relationships with recordkeepers, financial advisors and plan sponsors and drive increased market share and sustainable growth. Definiti is well positioned in the marketplace and I’m looking forward to promoting our unique value proposition going forward,” said Frink.

Schaaf brings over two decades of ERISA Counsel experience to her position at Definiti. She’s held senior ERISA counsel roles at Ameritas, served as an ERISA consultant with Ohio National, and most recently was Manager of Retirement Plan Administration with Alliant Insurance Services. She holds a JD from the University of Cincinnati College of Law and a BA from the University of Dayton.

“Betsy’s strong ERISA background, coupled with her knowledge of retirement plan administration, make her uniquely qualified for the role. She’ll help our customers and colleagues navigate regulatory challenges through practical application of the law,” said Gaillard.

“This opportunity with Definiti gives me a chance to apply my legal knowledge along with the experience I have gained in the industry. I’m excited to be part of a growing, dynamic company,” said Schaaf.



ABOUT DEFINITI

From 401(k) plan design and compliance, 3(16) services and plan administration, to actuarial consulting and recordkeeping, Definiti helps organizations deliver smart retirement solutions to their employees. With hundreds of experts across the country, including in-house actuarial consultants, ERISA attorneys, document specialists, and retirement plan consultants, Definiti helps clients define what's possible with workplace retirement plans.

To learn more about Definiti, visit definiti.com.

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