

## Steve Gresham Speaker Introduction:

Steve Gresham is one of the financial industry's true pioneers. A graduate of Brown University, he began his career in 1980 and since that time has held senior executive positions at several Wall Street firms, where he developed several innovative financial products such as managed accounts and lifecycle mutual funds. As managing principal of The Gresham Company, he has worked with more than 50 leading financial service companies around the world. Steve's passion is the advice industry. He is the author of four books on advisor best practices including the most recent top seller, Advisor for Life. His fifth book, The Gen-X Advisor, is due out next year.

You may have seen Steve on CNN, USA Network or PBS, or in the pages of Business Week, Fortune or the New York Times. He writes a monthly column for Registered Rep magazine and he serves on the board of governors of both the Money Management Institute and the International Money Management Institute. He was co-recipient of the Mutual Fund Marketer of the Year awarded by Institutional Investor/Fund Action in 2007 and, most recently, he was named Visiting Instructor in Public Policy at the A. Alfred Taubman Center for Public Policy and American Institutions at Brown University.

It is my pleasure to welcome our friend, Steve Gresham.