

# Retirement Industry People Moves

CastleKeep names Mike Benevento partner; Snowden Lane Partners adds Eduardo Alvarez Andreu; Matt Berman named president at Foresters Financial; and more.

By *Noah Zuss*

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## CastleKeep Adds Industry Veteran Mike Benevento as Partner

CastleKeep Investment Advisers LLC announced the addition of Mike Benevento as partner.

“Having explored multiple opportunities across the wealth management spectrum, I can confidently say CastleKeep is a world class investment firm,” Benevento said in a statement. “It combines all of the capabilities of a global private bank, but delivers solutions to clients without bias and the bureaucracy that comes along with larger organizations.”

Prior to joining CastleKeep, Benevento was a portfolio manager at Millennium Management, a global alternative investment platform with more than \$58 billion in assets. He has also held portfolio manager and analyst roles at Bronson Point Management, Hilltop Park Associates and Pequot Capital Management.

## Snowden Lane Partners Adds New Adviser Eduardo Alvarez Andreu in Coral Gables

Snowden Lane Partners announced that Eduardo Alvarez Andreu has joined the firm with \$132 million in client assets. Alvarez Andreu will serve as a partner and managing director in the Coral Gables, Florida office.

He has nearly two decades of experience in financial services, with expertise in international wealth management and alternative investments.

“We are thrilled to welcome Eduardo to the firm, as he has built a strong track record in the wealth management space and will be a major asset for us moving forward,” said Greg Franks, managing partner, president and COO of Snowden Lane Partners, in a statement.

## Matt Berman Adds Canada to Foresters Financial US Presidential Duties

Foresters Financial announced the appointment of Matt Berman as president of Foresters Financial U.S. and Canada, effective immediately.

Previously, Berman was president of only the company’s U.S. operations. He has also served as chief distribution officer and president of the former subsidiary, Foresters Life Insurance and Annuity Company.

“I am truly honored to be appointed president of the US and Canadian divisions,” Berman said in a statement. “I am eager to continue our strong momentum in both markets by executing our long-term strategic goals and providing customers with best-in-class solutions and service.”

## The Wagner Law Group Announces Lee T. Polk as Chicago-Based Partner

The Wagner Law Group announced that attorney Lee T. Polk has joined the firm as a partner in its Chicago office.

“Lee is a highly accomplished ERISA and employee benefits attorney with decades of experience in his areas of practice,” Marcia S. Wagner, founder and managing partner of The Wagner Law Group, said in a statement. “He is an outstanding addition to our firm and we are delighted he is joining us.”

Polk is experienced in ERISA and employee benefits compliance, planning and dispute resolution. He regularly advises clients on the design, establishment, administration and termination of pension and welfare benefits plans.

## Ascensus Names Bradley Strock to Board of Directors

Ascensus LLC announced that Bradley Strock has joined its board of directors.

“Brad brings a wealth of highly relevant technology and business leadership experience across the global financial services industry to the Ascensus Board,” David Musto, president of Ascensus, said in a statement.

Strock most recently held the position of global CIO at PayPal, where he oversaw all internal technologies. He led the company’s use of data to improve service capabilities and customer-centric experiences.

He previously served as senior vice president with Bank of America, overseeing end-to-end technology. He has also held leadership roles in marketing operations technology at JPMorgan Chase and business process improvement at First USA/Bank One.

## Franklin Templeton Appoints Davidow as Senior Alternatives Strategist

Franklin Templeton has appointed Tony Davidow as a senior alternative investment strategist at the Franklin Templeton Institute.

Davidow will be responsible for developing insights into the use of alternative investments. He will conduct independent research, present at industry conferences and webinars and engage directly with key partners and clients.

“Tony’s efforts will support our mission to deliver research-driven insights, expert views and industry-leading events for clients and investors globally, through the diverse expertise of our specialized alternative investment managers and select academic partners,” said Stephen Dover, chief market strategist and head of the Franklin Templeton Institute, in a statement.

## WTW Names Tiffany Velez Director of Retirement

British-American multinational company WTW has named Tiffany Velez as director of retirement.

According to LinkedIn, Velez has more than 20 years of experience leading cross-functional teams. She has delivered technology and product solutions on all aspects of product management, user experience design, application development and system implementations.

Before joining WTW, Velez worked at Mercer and at ACS, a Xerox company, implementing technical projects.

## TIAA Names Zara Mirza Chief Brand Officer

TIAA has named Zara Mirza as chief brand officer. Mirza will lead the brand strategy, brand marketing, creative and corporate social responsibility teams for TIAA and Nuveen.

Mirza was previously chief brand officer at GE, where she was responsible for ensuring the brand remained relevant to key audiences.

“Zara brings extensive experience transforming how brands go to market and will continue to elevate TIAA so that more institutional partners and new generations of consumers embrace the power of securing lifetime income,” TIAA chief marketing officer Mickey Onvural said in a statement.

## Cambridge Associates Expands Executive Leadership

Cambridge Associates appointed Harinder Soin and Adam Lester to its executive leadership team.

Soin, the company’s chief data officer, oversees the firm’s data strategy, governance and execution. He joined Cambridge Associates in 2016 and became the firm’s first chief data officer in 2019.

Lester, head of corporate strategy, joined Cambridge Associates in November 2022. He will work closely with the CEO and leadership team to define Cambridge Associates’ strategic direction.

## Insured Retirement Institute Names New Director, Government and Political Affairs

John Jennings was promoted to director of government and political affairs at the Insured Retirement Institute, headquartered in Washington, D.C.

Jennings will assist in the overall development and execution of IRI’s legislative and political strategy. He will advocate on IRI’s behalf to advance federal

legislative objectives in Congress and serve as a liaison to other industry trade associations and coalitions. He will also provide input on political strategies associated with [the political action committee] IRIPAC.

## Bank of America Hires Director of Equity and Consultant Relations

Danyle Anderson has joined Bank of America as director of equity industry and consultant relations. Anderson will be responsible for driving insights and strategies across the Bank of America product portfolio. She will also manage relationships with strategic industry partners.

“We are committed to helping our clients stay informed about changes in the market and to growing our business. Danyle will play a key role in sharing insights and best practices with our clients,” Erin Donnelly, managing director of institutional retirement product and distribution at Bank of America, said in a statement.

Previously Anderson was CEO and executive director at the Global Equity Organization.

## Stonebridge Group Hires Two Advisers

Lonn Lebo and Parker Marsh joined Pennsylvania wealth manager Stonebridge Financial Group as financial advisers. They will report to managing directors Jonathan Freeman and Brian McCarver.

Parker and Lebo will work with personal wealth management clients to maximize and preserve their wealth and combining traditional investment management with holistic financial planning.

Tagged: Alternative investments, CEO, CIO, ERISA, People