

Retirement Industry People Moves

Mercer hires one new investment executive, promotes another; ERISA expert Wagner tapped for employee benefit leadership posts; Fiduciary Trust hires client development lead from Bernstein; and more.

Reported by [ALEX ORTOLANI](#)

Mercer Names Two Investment Team Leaders

Mercer, a business of Marsh McLennan, appointed two new senior level positions to its wealth division, both reporting to **Marc Cordover, U.S. wealth leader**.

Anne Marie Schultz will take the new role of **U.S. investments commercial leader**. Schultz will work with Mercer's investment teams on the delivery of investment tools, advice and solutions to institutional clients, including defined benefit and contribution plans; endowments and foundations; insurers; and health care and wealth management organizations.

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Schultz joins from BlackRock, where she provided industry insight, investment solutions and risk advice to insurance companies and health systems. Before that, she had been with Oliver Wyman, like Mercer a Marsh McLennan business.

Sylvia Diez will take an expanded position of **U.S. investments sales leader** overseeing business development with investments clients; she will maintain her role as **central zone wealth practice leader**. She joined Mercer as a partner in 2021 from a position as executive vice president and regional managing director at PNC, overseeing institutional asset management groups in the Midwest and West.

Marcia Wagner Named to Leadership Posts at Benefits Councils

Marcia Wagner, founder and managing director of the Wagner Law Group, has been appointed to the advisory council to the policy board of directors for the **American Benefits Council** and the board of governors of the **American College of Employee Benefits Counsel Inc.**

The American Benefits Council is an employee benefits public policy organization that advocates on behalf of employers aiming to run industry-leading benefits programs to protect and encourage the health and financial wellness of employees, retirees and families.

The ACEBC is an invitation-only organization of employee benefits lawyers aiming to elevate industry standards and advance the public's understanding of employee benefits law. The Wagner Law Group's attorneys include nine ACEBC fellows.

Wagner is "honored to have been chosen to serve in these respective positions and looks forward to providing a meaningful contribution," according to a firm statement.

Fiduciary Trust Brings On VP

Fiduciary Trust Co. hired **Kevin McAuliffe** as **vice president and client development officer** to focus on client needs and business development efforts. He will report to **Sidney Queler, head of wealth management**.

McAuliffe joins from Bernstein Private Wealth, where he was a private wealth adviser; before that, he was a managing regional director for Natixis Investment Management.

Fiduciary Trust is a privately owned wealth management firm working with families, individuals and nonprofits.

JP Morgan Wealth Hires FA from Bernstein

J.P. Morgan Wealth Management hired **Michael Lopes** as a **wealth partner** working out of its Washington, D.C., office.

Lopes works with individuals and families, with a focus on entrepreneurs and business owners, and will report to **Market Leader Kim Bonanni**.

Lopes left a role at Bernstein Private Wealth Management, where he managed more than \$600 million in client assets.

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