CBIZ

Michael B. Glackin, AIF®, CFP®

Executive Vice President, InR Team of CBIZ Investment Advisory Services, LLC
Retirement & Investment Solutions

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Professional Summary

Mike is executive vice president of the InR Team of CBIZ Investment Advisory Services, LLC. He has over 30 years of experience in the financial services industry. He provides investment advisory services to plan sponsors responsible for defined contribution plans (including 401(k), 403(b) and 457 plans), defined benefit plans, DROP and cash balance plans. Mike works with plan sponsors to help them meet their organization's retirement plan goals and manage the personal liability associated with being a fiduciary to a qualified plan. Mike is a member of the CBIZ Discretionary Investment Committee where special emphasis is given to developing the proper asset allocation by selecting low cost investments and providing full fee transparency.

About Mike

Mike, his wife, Francine, and their family love boating on the Chesapeake Bay in the summer and snowboarding and skiing vacations in the winter. Mike is on the Board of the Delaware County Hero Scholarship Fund. The Delaware County Hero Scholarship Fund provides scholarships for the children of police, firefighters, and emergency responders who have died in the line of duty. Mike is also on the Board of The Delaware County Fraternal Order of Police Foundation which is a not-for-profit agency to help support families of fallen police officers or police officers experiencing hard times.

Education

B.S., Business Administration, Widener University

Professional Affiliations

Accredited Investment Fiduciary® (AIF®)
Certified Financial Planner® (CFP®)

Professional Recognition

10-year Five Star Wealth Manager award recognized in Fortune and Philadelphia Magazines†

The InR Team is recognized as a Dalbar Certified ERISA 3(38) Investment Manager‡

About the Firm

CBIZ, Inc. (NYSE: CBZ) is one of the nation's leading providers of professional advisory services. The Retirement & Investment Solutions practice provides a broad range of investment advisory, actuarial, and administration services to thousands of institutional and private clients.

† This award was issued on 11/1/22 by Five Star Professional (FSP) for the time period 2/21/22 through 8/19/22. Fee paid for use of marketing materials. Self-completed questionnaire was used for rating. This rating is not related to the quality of the investment advice and based solely on the disclosed criteria. 3604 Philadelphia-area wealth managers were considered for the award; 305 (8% of candidates) were named 2022 Five Star Wealth Managers. Wealth managers do not pay a fee to be considered or placed on the final list of Five Star Wealth Managers. The award is based on 10 objective criteria. Eligibility criteria-required: 1. Credentialed as a registered investment adviser (RIA) or a registered investment adviser representative; 2. Actively licensed as a RIA or as a principal of a registered investment adviser firm for a minimum of 5 years; 3. Favorable regulatory and complaint history review (As defined by FSP, the wealth manager has not; A. Been subject to a regulatory action that resulted in a license being suspended or revoked, or payment of a fine; B. Had more than a total of three settled or pending complaints filed against them and/or a total of five settled, pending, dismissed or denied complaints with any regulatory authority or FSP's consumer complaint process. Unfavorable feedback may have been discovered through a check of complaints registered with a regulatory authority or complaints registered through FSP's consumer complaint process; feedback may not be representative of any one client's experience; C. Individually contributed to a financial settlement of a customer complaint; D. Filed for personal bankruptcy within the past 11 years; E. Been terminated from a financial services firm within the past 11 years; F. Been convicted of a felony); 4. Fulfilled their firm review based on internal standards; 5. Accepting new clients. Evaluation criteria-considered: 6. One-year client retention rate; 7. Five-year client retention rate; 8. Non-institutional discretionary and/or non-discretionary client assets administered; 9. Number of client households served; 10. Education and professional designations. FSP does not evaluate quality of services provided to clients. The award is not indicative of the wealth manager's future performance . Wealth Managers may or may not use discretion in their practice and therefore may not manage their clients' assets. The inclusion of a wealth manager on the Five Star Wealth Manager list should not be construed as an endorsement of the wealth manager by FSP or this publication. Working with a Five Star Wealth Manager or any wealth manager is no guarantee as to future investment success, nor is there any guarantee that the selected wealth managers will be awarded this accomplishment by FSP in the future. Visit www.fivestarprofessional.com.

‡ The DALBAR 3(38) Certification Program provides an independent assessment of an investment manager's ability to satisfy the requirements of ERISA section 3(38). CBIZ InR has met the requirements set forth by DALBAR to become a DALBAR Certified ERISA 3(38) Investment Manager.

Rich Ritzer, AIF®, CFP®

Vice President, The CBIZ InR Team
Retirement & Investment Solutions

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Professional Summary

Rich is a vice president at CBIZ InR, a team of CBIZ Investment Advisory Services, LLC. He provides investment advisory services to plan sponsors responsible for defined contribution plans (including 401(k), 403(b), and 457 plans), defined benefit plans, DROP, and cash balance plans. Rich works with plan sponsors to help them meet their organization's retirement plan goals and manage the personal liability associated with being a fiduciary to a qualified plan. In addition to qualified plans, Rich advises endowments, foundations, trusts, and individual investors. That advice includes developing financial plans to address the risk tolerance, time horizon, and financial need of the client. Special emphasis is given to developing the proper asset allocation by selecting low-cost investments and providing full fee transparency.

Education

B.S., Finance, Pennsylvania State University

Professional Affiliations

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Certified Financial Planner® (CFP®)

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