Key Shareholders

Jack M. Marco, Chairman

Jack began his career as an investment consultant in 1977 when he joined A.G. Becker, Inc. As Senior Vice President, he specialized in multi-employer plans. In 1983, SEI Corporation purchased the consulting division of A.G. Becker and named him the National Manager of its Taft-Hartley Funds Evaluation Services. In January of 1988 Jack left SEI to form The Marco Consulting Group.

Jack received his BS in Mathematics from Lewis University and continued his graduate studies at Purdue, Northwestern, and Northern Illinois Universities. He became a high school math teacher before joining U.S. Representative Abner Mikva as his Administrative Assistant. At age 26, he served as the Director of the Illinois Environmental Protection Agency. He then went on to serve as a Director of the Federal Home Loan Bank of Chicago. In 2000, he was appointed a Trustee of the Illinois State Board of Investment. He currently is a Trustee of the National Labor College, a Board Member and Treasurer of the Mikva Challenge Grant Foundation, a Board Member of American Rights at Work – Jobs with Jusitce, and a member of Trustee Leadership Forum for Retirement Security of the Hauser Center at the Harvard Kennedy School. Jack has also taught a course on investment consulting as a Lecturer at DePaul University's Graduate School of Commerce

Thomas A. Mitchell, Sr., Vice Chairman

Tom is a founding principal and Vice Chairman of The Marco Consulting Group. He has served the Taft-Hartley fund community for more than 40 years, initially as an employee benefits fund administrator, and as an investment consultant since 1988.

Tom has been a frequent speaker on a broad range of investment-related topics, has served as a member of the International Foundation of Employee Benefit Plans' Investment Committee, as well as the Committee's Chairman. He has written extensively on various investment topics, and has contributed several investment-related chapters to the International Foundation's Trustee Handbook.

Tom's undergraduate studies were at Northeastern Illinois University. He is a Certified Employee Benefit Specialist.

Key Shareholders

Jason Zenk, Chief Executive Officer

Jason joined The Marco Consulting Group in 2003 and currently serves as Chief Executive Officer. He is a member of the MCG Management Committee, the Fiduciary Services Committee, and is a principal of the firm. Jason has been a benefit and investment consultant working on defined benefit, defined contribution, and welfare plans since 1998. He specializes in asset allocation, manager structure/selection, and trustee education and is a frequent speaker at the International Foundation of Employee Benefit Plans conferences.

In 2005, Jason was appointed as an advisor to the multi-billion dollar Washington State Employee Retirement Benefits Board by Governor Gary Locke.

Jason received his M.A. from Georgetown University and his B.S. from Santa Clara University.

Michael D. Joyce, Esq., CEBS, Executive V.P., and Sr. Consultant

Since 1988, Michael has spent his professional career working with Taft-Hartley, public, and other benefit plans. Prior to joining The Marco Consulting Group in 1998, Michael was a partner with Murphy, Hesse, Toomey & Lehane in Quincy, Massachusetts, serving in the firm's ERISA/Employee Benefits practice group.

Michael has been a frequent speaker and contributing author on a wide range of benefit, investment, and retirement topics, including presentations for the ISCEBS, IFEBP, and other industry and trade organizations. Michael also serves as board member for a number of non-profit organizations.

Michael received his J.D. from Suffolk University Law School and his B.A. from the University of Notre Dame. He earned his designation as a Certified Employee Benefit Specialist in 1991 and is a Fellow in the International Society of Certified Employee Benefit Specialists. He is a past president of the Governing Council of the ISCEBS.

Key Shareholders

Susan A. Crotty, Sr. Vice President and Sr. Consultant

Sue has been an investment professional for thirty years. Prior to joining The Marco Consulting Group in 2010, Sue began her investment career as a financial analyst for GTE and subsequently General Motors in the management of the hourly and salaried employees' pension funds. Thereafter Sue was an investment consultant working with multi-employer, foundation, corporate and other pension plans in the management of their funds. She spent twelve years providing advice on asset allocation, manager selection, and investment performance for Hamilton & Company in New York. At Callan Associates, Sue was a member of the management committee and worked in the investment management division as well as an Alternatives Practice Leader before joining a hedge fund of funds.

Sue was a member of the New Jersey State Investment Council for six years, providing oversight on policy and management to the $70 billion New Jersey State Pension Fund. She is also a member of the Investment Committee of Church of Christ the King and Homeless Solutions in Morristown, New Jersey.

Sue received an M.B.A. in finance from the University of Connecticut and her B.S. from Boston College.

Greg Kinczewski, Vice President and General Counsel

Greg joined The Marco Consulting Group in 1991 as Legal Counsel and Proxy Voting Services' Administrator. The group he oversees is responsible for analyzing and voting on shareholder issues for more than 6,000 U.S. and foreign companies each year. Prior to joining MCG in 1991 MCG Greg reported on the White House, Congress, and the Pentagon, and served as a Press Aide to U.S. Congressman Abner Mikva. He litigated cases before the Illinois and Federal trial, appellate, and supreme courts, and was general counsel to several private and municipal corporations.

Greg received his J.D. degree from DePaul Law School, and his M.S. and B.S. degrees in Journalism from Northwestern University.

Key Shareholders

Amy C. Forebaugh, Vice President and Director of Fiduciary Services

Amy joined The Marco Consulting Group in 1998 and currently serves as the Director of Fiduciary Services. Since the inception of MCG's Fiduciary Services program, she has developed the product and built the team that currently services our clients. Amy has been instrumental in the development, implementation, and oversight of the investment products created for Fiduciary Services clients, was named Vice President in 2007, and subsequently has served as a member of MCG's Management Committee. Amy has served many roles during her tenure at MCG including Consultant and Director of Account Managers. She also spent time as a business analyst helping the firm to develop its proprietary systems. Prior to serving Taft-Hartley benefit plans, Amy worked at State Street Bank as a manager in their mutual fund accounting area for six years.

Amy holds a BS in Accounting and a BS in Business Administration from the University of Kansas.

Julian Regan, Vice President and Sr. Consultant

Julian began his career auditing public retirement systems and worked his way up to become chief executive for an $8 billion public retirement board, a U.S. Treasury appointee to a committee that advises the IRS, and a series of senior management roles before joining MCG in 2009. He serves on MCG's Fiduciary Services Committee and is an author and speaker for some of the nation's leading labor/management and public benefit plan organizations.

Between 2001 and 2006, Julian served as Executive Director for the New York State Deferred Compensation Board, where he ran the state's 159,000-member supplemental retirement plan and regulated 250 local plans. He also served as Vice President, Risk Governance and Strategy for Fidelity Investments and as Assistant General Manager and Budget Director for the Massachusetts Bay Transportation Authority. Julian is a former member of HERE Local 26, a 2008 recipient of the IRS Tax-Exempt and Government Entities "Commissioner's Award", and a 2004 "Plan Sponsor of the Year" award recipient.

He received an MBA and BSBA from Suffolk University.

Key Shareholders

John W. Marco, Sr. Consultant

John joined The Marco Consulting Group in 2005 as both an Investment Manager Analyst and Consultant. Prior to joining MCG, John worked with the Denver Area Labor Federation, AFL-CIO, as an organizer, researcher, and lobbyist. He acted on behalf of union members and signatory contractors in multiple capacities, and worked to implement “best value” and “responsible contractor” policies for the city and county of Denver.

Prior to his union-related experience, he worked for three investment managers, with strengths in varying investment styles and approaches. As a result, John gained expertise in all traditional asset classes and styles, as well as both fundamental and quantitative approaches. In addition, John is a member of the International Foundation of Employee Benefit Funds.

John received his M.B.A. with distinction from DePaul University in Chicago and his B.A. in Economics from the University of Colorado at Boulder. He currently is a Board Member of the Mikva Challenge Grant Foundation.

Nick Trella, Sr. Consultant

Nick Trella joined The Marco Consulting Group in 2008 as Assistant Director, Fiduciary Services and currently supports his clients in his role as Sr. Consultant. Nick began his career in the investment industry in 1999 as a proprietary trader for Goldenberg, Hehmeyer & Co. in Chicago where he specialized in the S&P, NASDAQ, and Euro Currency future markets. Prior to joining MCG, he served as an Investment Consultant at Cartesia Financial for four years, a boutique investment company that sourced capital to small and mid-sized hedge funds and commodity trading advisors for institutional investors. He was responsible for all aspects of client engagement including analyzing investment strategies, identifying risks, providing marketing feedback, and managing contract compliance.

Nick holds his M.B.A from The University of Chicago and his B.S. in Mathematics from the University of Notre Dame

Key Personnel

John Hume, CIMA, Consultant

John joined The Marco Consulting Group in 2010 as a Consultant. John began his career in the investment industry in 1994. Prior to joining MCG, John served as a Principal at Mercer, servicing their multi-employer clients. Prior to Mercer, he was a Senior Vice President at Putnam Investments, where he also supported multi-employer defined benefit and defined contribution plans. Of special note during his tenure at Putnam were his contributions in helping to develop their leading national DC plan services. John has also held positions in business development and client services at Rockland Trust Company and Fidelity Investments.

John earned his M.B.A from Suffolk University and his B.S. in Economics from the University of Massachusetts at Boston. John holds a CIMA® designation awarded by the Investment Management Consultants Association. In addition, he holds Series 6, 7, and 63 licenses. He is also an active member of both the International Foundation of Employee Benefit Plans and the Investment Management Consultants Association.

Eileen M. Dunbar, CPA, Chief Operating Officer

Eileen joined The Marco Consulting Group in 2009 as Chief Financial Officer and was appointed as a member of the Management Committee in early 2011. In August of 2011 Eileen was promoted to Chief Operating Officer. Prior to joining MCG, she worked for George Korbakes & Company, Certified Public Accountants, and before that as the Director of Financial Systems for One Life Insurance (a division of Bank One]. She also served as a Senior Auditor at Thomas Havey & Company, auditing and advising primarily Taft-Hartley clients. She has over 20 years of accounting experience.

Eileen received her B.S. in Accountancy from Northern Illinois University. She is a member of the American Institute of Certified Public Accountants and the Illinois CPA Society.

Key Shareholders

Matthew DeConcini, Chief Compliance Officer & Deputy General Counsel

Matthew DeConcini joined The Marco Consulting Group in 2007 as Deputy General Counsel. In June of 2010, Matthew was appointed as Chief Compliance Officer. Prior to joining The Marco Consulting Group, from 2001 to 2007, Matthew was Fund Counsel to the Bakery and Confectionery Union and Industry International Health Benefits and Pension Funds, a large multi-employer Taft-Hartley health benefits and pension fund with more than $6 billion in assets.

From 1990 to 2001, Matthew held the positions of Legislative Representative, Assistant Director of Safety and Health, and Assistant General Counsel for the International Union of Operating Engineers, a building trades and industrial union with more than 400,000 members.

Matthew received his J.D. from Georgetown University and his B.A. from Providence College. Matthew is a member of the Illinois, Maryland and District of Columbia Bar Associations.

Bonnie L. Goldsborough, CFA, Director of Research & Portfolio Manager

After spending her early career in Washington, D.C. as a consultant to various U.S. federal government agencies, Bonnie shifted her career focus to investment management in 1999. She joined The Marco Consulting Group in 2009 as Assistant Director of Research, and was promoted to Portfolio Manager of MCG’s Fiduciary Services Equity Group Trust in March of 2010. In May of 2010 Bonnie was promoted to Director of Research. As the Director of Research, Bonnie continues her oversight responsibilities for the Equity Group Trust in addition to overseeing the firm's research, analytical, and due diligence process. Prior to joining MCG, Bonnie worked as an Equity Analyst at UBS Global Asset Management and at the Bank of America subsidiary Evergreen Investments. She also worked at Fidelity Management and Research Company.

Bonnie earned her M.B.A. from The Wharton School of the University of Pennsylvania, a Master of International Affairs from the School of International and Public Affairs at Columbia University, and earned her B.A. from Beloit College with honors. Bonnie is a Chartered Financial Analyst. In addition, she is a member of the CFA Society of Chicago and is Vice Chair of Women Investment Professionals.

Key Shareholders

Beth Mitchell, Director of Operations

Beth Mitchell joined The Marco Consulting Group in 1997. Beth has extensive experience across a number of roles at MCG including Business Analyst and Director of Performance Reporting. She helped to develop MCG's proprietary reporting and performance systems as well as the firm's internal systems and controls. In January, 2012, Beth was promoted to Director of Operations. As Director she is responsible for consultant support, IT projects, and systems maintenance, and the coordination of compliance procedures.

Beth earned a BA in Political Science from Eastern Illinois University. She has also earned the Leadership Certificate from the University of Chicago Graham School and a Master Certificate in Applied Project Management from Villanova University.

Karolina Sienkiel, Director of Finance

Karolina joined The Marco Consulting Group in 2007 as an Accounting Assistant and was promoted to Sr. Finance Associate in 2009. In September of 2011, Karolina was promoted to Director of Finance to oversee all the financial functions of the firm. Karolina began her career at Ampco where she handled payroll and various accounting responsibilities.

Karolina received an M.B.A. with a concentration in Finance from DePaul University, and earned a B.B.A. from Loyola University Chicago.