



gail weiss & associates

Gail Weiss President

Gail Weiss is a founding partner of Gail Weiss & Associates, Inc. and she is primary architect of the strategic vision for the firm.

Gail has over 20 years of experience in the employee benefit and financial services industries. She has held a variety of positions at such firms as the Northern Trust Company, Bankers Trust Company, Buck Consultants and Charles Schwab. Her responsibilities have included employee benefit trust administration, participant recordkeeping management and plan design consulting. In addition, Gail has been charged with new product development and business strategy design and implementation at many different institutions. She has held a variety of regulatory compliance positions requiring oversight of internal and external audits, both state and national banking exams, Internal Revenue Service and Department of Labor audits and the National Association of Securities Dealers and New York Stock Exchange compliance requirements.

Gail is an active member of the Investment Company Institute's Bank & Trust Advisory Committee, Vice Chairman of the American Society of Pension Actuaries Government Affairs Committee and the Trust Compliance Managers Roundtable. She is a frequent speaker at conferences on various aspects of mutual funds, employee benefit plan administration, and trust compliance. She is a contributing author to the *Sheshunoff Trust Department Management Manual*, and has published numerous articles in such publications as the American Bankers Association's *Employee Benefit Quarterly*.

Gail received her Bachelor of Arts in Economics from Georgetown University, Washington, DC. In addition, she has completed graduate studies at Oxford University, Oxford, England and at Cornell University/Baruch College, New York, NY. Gail has received her certification in Benefits and Compensation Management from New York University, New York, NY and has completed a number of the Certified Employee Benefit Specialist (CEBS) and American Society of Pension Actuary exams. She was awarded the Certified Employee Benefit Trust Professional designation by the American Bankers Association.

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