



Brian E. Dean, CFA, CPA

President

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Brian is active in many not-for-profit organizations in Northeast Ohio. He is a past President and current board member of the Cleveland Chapter of Legatus. He served as a board chair of the Jesuit Retreat House and has been active on finance, investment, development and endowment committees of other organizations including the Cleveland Right to Life and his alma mater Saint Ignatius High School.

Brian and his wife, Maria, live in Brecksville, Ohio, and have four children, Michael, Anna, Olivia and Julia.

Professional Background

Brian is the president of CBIZ Retirement Plan Services and CBIZ Investment Advisory Services, leading the retirement plan and investment management consulting practices. Brian and his retirement plan consulting team at CBIZ RPS serve the investment advisory, actuarial, administrative and communication needs of retirement plan sponsors of public and private companies, as well as not-for-profit organizations. Additionally, through CBIZ IAS, Brian and his team provide investment management services to individuals, trusts, defined benefit plans, cash balance plans, endowments and foundations.

Education

- B.S.B.A., Accounting, John Carroll University

Awards and Recognitions

- CBIZ RPS has been named a *PLANADVISER* Top 100 Retirement Plan Adviser every year since 2014.

Professional Designations

- Chartered Financial Analyst (CFA)
- Certified Public Accountant (CPA)



CBIZ Retirement Plan Services is a trade name under which certain subsidiaries of CBIZ, Inc. (NYSE Listed: CBZ) market investment advisory, investment management, third party administration, actuarial and other retirement plan services. Investments, investment advisory and investment management services offered through CBIZ Financial Solutions, Inc., Member FINRA, SIPC and SEC Registered Investment Adviser, dba CBIZ Retirement Plan Advisory Services. Investment advisory and investment management services may also be offered through CBIZ Investment Advisory Services, LLC, SEC Registered Investment Adviser. Third party administration, actuarial and other consulting services offered through CBIZ Benefits & Insurance Services, Inc. Investment management services to individuals, corporations, trusts, endowments and foundations offered through CBIZ Investment Advisory Services, LLC, SEC Registered Investment Adviser. Investment management services to governmental and/or municipal defined benefit plans, 457 plans and related individuals provided by CBIZ Investment Advisory Services, LLC, SEC Registered Investment Adviser. Rankings/recognition by unaffiliated rating services/publications should not be construed as a guarantee of a certain level of results if CBIZ Retirement Plan Services (CBIZ Financial Solutions, Inc. or CBIZ Investment Advisory Services, LLC) is engaged, or continues to be engaged, to provide investment advisory services. The "PLANADVISER Top 100 Retirement Plan Advisers" list is compiled from responses to the PLANADVISER Retirement Plan Adviser Survey. The list is drawn solely from a set of quantitative variables and information in the survey supplied by the advisers themselves. CBIZ Retirement Plan Services was the sole recipient of the PLANADVISER Top 100 Plan Adviser award in years 2014 - 2018. Beginning in 2019, quantitative variables and information for the survey were supplied by CBIZ Retirement Plan Services in conjunction with CBIZ Investment Advisory Services.