

Larry E. Crocker

Biography



Name

Background

Larry E. Crocker, CEO

AIFA, CRPS, AAMS, PRP, PPC, RF, GFS
Certified Behavioral Finance Analyst (CBFA)
Certified Plan Fiduciary Adviser (CPFA)
CEFEX Certification Analyst



Larry E. Crocker is a respected industry thought leader for his knowledge of ERISA and fiduciary compliance. As a professional fiduciary consultant and analyst, clients enjoy the security of having someone with his level of expertise guiding them in their day-to-day management decisions of their retirement plan. He is the CEO of Fiduciary Consulting Group, Inc., an independent compliance consulting and fiduciary management firm. The Middle Tennessee-based firm, with a regional office in Burleson, TX, serves brokers, advisors, retirement plan sponsors, fiduciaries, plan committees, board members and institutional clients throughout the United States.

With over twenty-five years of experience in the financial services industry, Mr. Crocker transitioned from advisor to consultant in 2004. He now focuses on the development and implementation of practices and procedures that identify and solve procedural prudence and fiduciary compliance problems in the management of **retirement plans (401k, 403b, and defined benefit), endowments, foundations and post-retirement medical trusts**. He has hosted multiple conferences, workshops and training sessions and spoken at multiple venues on the topics of retirement plan governance, fiduciary compliance, the changing regulatory environment, fiduciary roles and responsibilities, prudent practices and the new 403(b) regulations. Mr. Crocker has a passion to help clients ease the burden of responsibility in managing their fiduciary duties and help service providers develop and deliver a real value proposition in the *New Fiduciary Service Model*[™] - the post Department of Labor 408(b)(2) regulatory marketplace.

Mr. Crocker is a certification analyst for the Centre for Fiduciary Excellence (CEFEX) located in Toronto, Canada. As an analyst, he is qualified to perform certification assessments and audits on investment advisors, stewards of retirement plans, endowments, foundations, other non-profit organizations and various other service providers. Mr. Crocker holds the following designations: *Accredited Investment Fiduciary Analyst*[™], *Chartered Retirement Plans Specialist*[™], *Accredited Asset Management Specialist*[™], *PlanSponsor Retirement Professional*[™], *Professional Plan Consultant*[™], *Registered Fiduciary*[™], *Global Fiduciary Strategist*[™], *Certified Behavioral Finance Analyst*[™], and *Certified Plan Fiduciary Adviser*[™].

Fiduciary Consulting Group is an industry leading provider of outsourced fiduciary management services. The firm will serve as the ERISA §3(16) Plan Administrator and ERISA §402 Named Fiduciary - to professionally manage a retirement plan and relieve the plan sponsor from their administration and management responsibilities.

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