



Robert Whited, CFA, CEBS

**Managing Director
Creative Planning Retirement Services
Los Angeles, California**

With a career spanning over 30 years, Rob has dedicated himself to helping plan sponsors maximize their plans' effectiveness and guiding senior HR and finance executives in making informed, long-term decisions. His leadership experience includes senior roles at Fidelity Investments and Wells Fargo, where he specialized in institutional investment services and benefit outsourcing. As a consultant, Rob has assisted clients in selecting fiduciary investment advisors and investment consultant teams for both nondiscretionary and full discretionary 3(38) OCIO outsourcing across retirement plans, endowments, and foundations. He brings expertise in fee structures, vendor strengths, and institutional investments, which allows him to simplify complex information and support sound decision making. Rob works closely with committees to distill content to the most relevant information, prioritizing risk mitigation, participant advice enhancements, fiduciary oversight, and data-driven plan improvements. Currently, Rob is a managing director for Creative Planning Retirement Services, one of the nation's largest retirement investment advisory firms. He earned a finance degree with a minor in decision sciences from Miami University in Ohio and holds the Chartered Financial Analyst® (CFA®) and Certified Employee Benefits Specialist® (CEBS®) designations. Rob volunteers as a grader for the CFA Level III exam and as an instructor for in-person classes for the International Foundation CEBS program. He also speaks on public sector 457/401a fiduciary and investment best practices.