



Meet

# Dave Forshew

## Specializations:

- Corporate 401(k) Plans
- Financial & Retirement Planning

## Qualifications:

- AIF® (Accredited Investment Fiduciary®)
- PPC™ (Professional Plan Consultant™)
- BA in Sports Management and Business Administration from the University of Mount Union

## Dave Forshew, AIF®, PPC™

Dave specializes in qualified retirement plan and fiduciary best practices consulting for small and mid-sized companies. In his role as a financial adviser, he works with businesses to develop goals for their retirement plans, properly administer their plans, monitor their progress and guide their employees toward their personal retirement dreams.

Previously, Dave was a retirement plan adviser for a Registered Investment Advisor. He also served as the retirement plan specialist for a national insurance-based financial firm.

Dave has earned his Accredited Investment Fiduciary® and Professional Plan Consultant™ designations. While at the University of Mount Union, Dave earned a BA in Sports Management and Business Administration.

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CAPITAL MANAGEMENT

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# Dave Forshew (continued)

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## How does Advance Capital's culture and resources contribute to your work?

Advance Capital is unique in that it is a large independent firm, which gives us the ability to pursue significant business growth and service a wide variety of client needs. But, unlike large national corporations, our independence allows for greater flexibility and individual involvement.

## Describe the importance of client education in your process.

I make it a priority to educate my clients so they develop a comfort level with the complexities of the retirement plan world. Our clients are busy as experts in their respective industries, so they turn to Advance Capital to be experts for them regarding their retirement plans. Yet, I want them to have an understanding of the services we provide so they can always feel confident I'm doing what is in their best interest. I tell my clients that I want them to know how to "tell time," but it's my job to know how to "take the watch apart."

## Where do good solutions come from?

Simple: Good solutions come from good people.

## What makes your client experience unique?

I work to get clients to consider me as a member of their executive team; specifically, their "Chief Retirement Officer." As their CRO, it is my role to help them lead their employees to a sustainable retirement.

*Investment advisory services are provided by Advance Capital Management, Inc.*

*Investments are not insured, and may lose money. Client should be prepared to bear the risks associated with investing.*

## Fun Fact!

In college, Dave was an NCAA National Champion and national record holder in the pole vault. His aspirations remain high, having recently achieved his lifelong dream of learning to play the bagpipes. He now plays with the Celtic Eagle Pipe Band, a competitive band that travels throughout the East Coast and Midwest to compete in various Highland Games.