



## TI-TRUST SENIOR STAFF





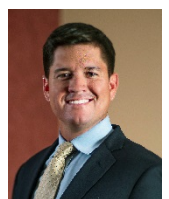
### **Brian Ippensen, CPA CMA, President**

BS Agricultural Economics, University of Illinois – Champaign. Brian’s past work experience includes staff and in-charge for public accounting and audits of banks and retirement plans; cost accounting for edible oil refinery and bean crushing manufacturing; international accountant for foreign export sales; retail banking operations. Brian currently serves on the Board of Directors and is the Chairperson of the Fiduciary Committee for The ESOP Association. Brian joined TI-TRUST, Inc., in 1997. He was appointed President January 1, 2006 and also serves as board member.



### **Dawn Goestenkers, MBA, Executive Vice President, Employee Benefits Group**

BS Finance, Quincy University, MBA Southern Illinois University - Edwardsville. Dawn brings vast experience and knowledge gained from more than 10 years in trustee services for employee stock ownership and qualified retirement plans. Dawn’s past work experience includes commercial credit underwriting and lending. She has a concentration in plan administration and DOL regulatory issues, as well as deep ESOP transactional experience. Dawn is a member of The ESOP Association, Employee Owned S-Corporation of America (ESCA), National Center for Employee Ownership (NCEO) and frequently speaks on trustee and fiduciary topics. Dawn joined TI-TRUST in 2007.



### **Frank “Chip” Brown, CFA, CPA/ABV/CFF, CVA, Senior Vice President, Employee Benefits Group**

BS Management, Georgia Institute of Technology, MS Accounting, Virginia. Chip’s past work experience includes providing valuation and transaction financial advisory services as a managing director for a national valuation firm where he served as the firm’s ESOP practice leader. These services included fairness opinions, solvency opinions, fair market valuations, and other financial advisory opinions to various parties, including ESOP fiduciaries. Chip has served an expert witness in state and federal court on a variety of matters pertaining to valuation and economic damages. He is an active member of The ESOP Association and the National Center for Employee Ownership. He has authored numerous articles, book chapters, and presentations related to ESOPs.



### **Ashley Melton, Senior Vice President, Employee Benefits Group**

BFA Studies Moore College of Art, University of Pennsylvania, BS Business/Marketing, West Chester University, Studies Graduate Studies West Chester University, Harvard University (HBS). Ashley has over two decades of experience in Employee Benefits. Her past work experience includes Vice President with Wilmington Trust Company and ING as well as holding a management position at The Vanguard Group. Ashley’s memberships include ASPA, the Profit Sharing Council of America, NCEO and The ESOP Association. She holds NASD Series 6, 26, 63, 65 and Life, Accident, Health, Disability, Property and Casualty Insurance Licenses. Ashley has been with TI-TRUST since 2006.





**Kimberly Serbin, Senior Vice President, Employee Benefits Group**

BS Business Administration / Accounting, Culver Stockton College. Kim currently serves as Trust Officer for approximately 65 ESOPs, the majority of which are closely held companies, and has worked on a number of ESOP Transactions. In addition, she serves as Trust Officer for a number of 401k Plans as well as Nonqualified Plans. Kim has been with TI-TRUST since 2001 with past experience in the investment and insurance sectors.



**Teresa Daggett, Vice President, Employee Benefits Group**

BS Accounting, University of Illinois – Champaign. Teresa’s past work experience includes public accounting, investment services and manufacturing. She works with both closely-held and publicly-traded ESOP companies and has worked on a number of ESOP transactions. CPA (inactive) received in 1991. Teresa has been with TI-TRUST since 2011.



**Blake Mock, AIF, Vice President, Employee Benefits Group**

Blake’s expertise is in ERISA qualified plans including 401(k) plans and non-qualified plans. Blake gained this expertise through working for MetLife Financial Services and eventually running an Independent Financial Services firm. Blake is a graduate of Quincy University with a BS in Management. He earned the Accredited Investment Fiduciary designation from the Center for Executive Education at the Joseph M. Katz Graduate School of Business at the University of Pittsburgh. Blake has been with TI-TRUST since 2006 and currently services numerous employee benefit plans nationwide assisting them with 404(c) compliance, Investment Policy, Section 408(b)2, valuation of closely held stock and plan design.



**Craig Baker, Senior Trust Officer, Employee Benefits Group**

BS Accounting, Quincy University. Craig’s past work experience includes commercial credit underwriting and lending in the Kansas City and St. Louis metro areas. He is responsible for over 40 ESOP’s with a concentration in publicly traded financial institutions, along with a number of non-qualified plans. He is a member of The ESOP Association as well as the National Center for Employee Ownership. Craig joined TI-TRUST in 2013.



**Steven Eckert, CPA, CFIRS, Executive Vice President, Risk Management**

BS Accounting, University of Illinois – Champaign. Steve’s past work experience includes public accounting, manufacturing, agribusiness, and banking. Assistant Vice President - Internal Audit until 2009. Certified Fiduciary & Investment Risk Specialist (CRIRS) in 2008. Steve has been with TI-TRUST since 2004.





**Michele R. Foster, Executive Vice President Legal Division/Corporate Counsel**

BS Psychology University of Texas - Dallas; Texas Wesleyan University School of Law; admitted State Bars of TX and IL. An experienced trial attorney, she defended clients in cases under the Employee Retirement Income Security Act (ERISA) as well as in investigations and audits relating to retirement plans brought by the U.S. Department of Labor. Prior to joining TI-TRUST in 2006, she was in private practice for more than fifteen years with a law firm in Dallas and was a regional claims manager for an international insurance company.



**Zachary Clark, Associate Counsel**

Zack graduated from Blackburn College in 2005 with a BA majoring in Political Science and Public Administration with a minor in Chemistry. He earned his JD from Northern Illinois University and was admitted to the Illinois bar in 2014. Since joining TI-TRUST in December of 2014, his role has primarily been supporting the Employee Benefits Group. He also provides legal support across all divisions of the company.

