

Corporate Profile

Shea Retirement Services is redefining standards of personal service in retirement plan consulting. Founder Jill Barry Shea launched her practice in 2006 on one enduring principle: Independence. A singular dedication to independent action and impartial advice uniquely positions her to fulfill the entrepreneurial demands of mid-market companies in Southern California, her chosen core market.

The quality of her select client list is testament: eHarmony; ICA Home Décor; Jacuzzi Brands Corporation; Palace Entertainment; PCM; Port Plastics; Quality Systems Inc.; Tilly's Apparel; The Johnny Rockets Group Restaurants, to name a few.



In her own words: "I give 100 percent to my plan sponsors. As co-fiduciary, every nuance of their plan commands my focus. Ours is truly a consultative relationship—from the big issues to the small concerns. It's all about retirement security for participants and plan fidelity for sponsors."

Many financial advisory firms affiliate with large providers and "sell" captive in-house products. As such, potential sponsors do not know if the advice given and products placed are best-suited to their circumstance.

In addition to extensive research and cutting-edge technology, Shea Retirement applies its market knowledge and expertise to develop custom-tailored solutions to each client. From vendor benchmarking and investment due diligence to fiduciary compliance and employee communication, every endeavor is relevant to successful plan outcomes.

Ms. Shea has built a 20-year career to corporate retirement planning, excelling in a number of executive positions, notably with Mercer Health & Benefits in Newport Beach, CA, where she focused on mid-market companies, and Zahorik Company, where she focused on large hospital systems.

Highly credentialed, Ms. Shea earned her Accredited Investment Fiduciary (AIF) designation in 2007, one of only a few thousand in the country to do so. She also holds a Certified Employee Benefits (CEBS) designation, her California State of Insurance; Series 6 and 63, Investment Advisor and Supervisory Principal licenses. Ms. Shea is a graduate of Scripps College in Claremont, CA, and resides with her husband and two young sons in Orange County.

Shea Retirement is a proud member of Retirement Plan Advisory Group, a national alliance of accomplished advisors devoted to best practices, and the largest practice management platform for retirement plan consultants in the country with 256 subscribing firms, 600 advisors and \$50 billion in collective assets under advisement.



Jill Shea Named to the "Most Successful Advisors" List by Plan Sponsor Magazine for 2007; "Top 40 Most Influential Advisors" by 401K Wire in 2009; Nominated to Orange County Business Journal 2010 List of Women in Business.

Shea Retirement Services, Inc.

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