Steven J. Levitt, CFA, CFP®

Professional Summary
Experienced investment professional with almost 30 years of financial services experience. Excellent reputation and proven track record for bringing innovative solutions to solve practical problems, improve customer satisfaction and retain and grow client relationships.

Key Accomplishments:
- Led clients and internal service teams to consistently achieve agreed-upon strategic initiatives
- Offered objective and unbiased advice to achieve “trusted advisor” status with clients
- Built and maintained strong client relationships which contributed to client retention
- Never lost a client for service-related reasons

Work History Summary
Instructor, Kansas State University
Manhattan, KS (August 2023 – Present)

Responsible for teaching various personal financial planning courses as assigned by the program’s Department Head. Also serve as the faculty advisor for Invest-A-Cats, a student-run organization offering members hands-on experience in selecting, monitoring and distributing assets for charitable purposes.

Personal Financial Counselor, Zeiders Enterprises, Inc.
Fort Riley, KS (August 2022 – August 2023)

Provided financial counseling and education to military servicemembers and their families to furnish them with a basic level of financial literacy, help them establish good financial behaviors and assist them with long term financial planning including retirement planning.

Senior Relationship Manager, The Vanguard Group, Inc.
Scottsdale, AZ (February 2012 – June 2022)

Accountable for the retention of a portfolio of institutional clients ($10.3 billion in assets and 62,000 participants) sponsoring 401(k) and nonqualified deferred compensation plans who selected Vanguard as the recordkeeper for their plans. Responsible for leading various Vanguard service teams in delivering all contractually agreed-upon services, internal and external problem resolution, plan design and consulting, introduction of new products and services and regular participation in client meetings with senior leaders and company executives.

Vice President, JPMorgan Retirement Plan Services
Kansas City, MO (April 2008 – January 2012)

Responsible for the retention and growth of a portfolio of institutional clients sponsoring 401(k) and nonqualified deferred compensation plans, each with plan assets in excess of $500 million, who selected JPMorgan Retirement Plan Services as the recordkeeper for their plans. Primary duties included leading various JPMorgan service teams in delivering all agreed-upon recordkeeping services, plan design and consulting, problem resolution, regular participation in client meetings and cross-selling of new products and services.

Vice President, American Century Investments

Kansas City, MO (July 1992 – August 2007)

Over the course of 15 years, held a number of manager and senior leadership positions in both the company's Institutional and Investment Management divisions. Was extensively involved in successfully building both American Century's 401(k) and institutional investment management businesses by managing and leading various service delivery teams and by actively participating in extensive sales and marketing activities. Responsibilities in American Century's Investment Management division included leading the team responsible for the creation and distribution of all content and analytics applicable to the over 80 mutual funds sponsored by American Century Investments.

Education
Master of Science – University of Akron, Akron, OH │Taxation
Bachelor of Science – Bowling Green State University, Bowling Green, OH │ Accounting

Certifications
▪ CERTIFIED FINANCIAL PLANNER™
▪ CFA® Charterholder, CFA Institute
▪ Certified Public Accountant (Inactive)