DEANA A. CALVELLI

AIF®, CEBS
Advisor
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Lockton Companies

Professional Profile

Forward-thinking and results-oriented, Deana leads client service teams and helps executives develop strategies to mitigate business risks, as well as benefits solutions to recruit, retain and retire talent on time. She provides organizations with valuable perspectives, helps them navigate alternatives, and ensures they are educated on new issues and trends.

Deana has specialized expertise in fiduciary governance, integrating health and financial benefits and employee well-being, plan administration oversight, investment selection and monitoring, and mergers and acquisitions consulting.

She has worked with Fortune 1000 firms, privately held companies, and nonprofit and public sector organizations. Deana has more than 25 years of industry experience with one of the nation's largest retirement providers, a national HR and benefits consulting firm, and independent consulting for plan sponsors, as well as national retirement and benefit providers.

Deana is a sought-after speaker on current industry trends and serves on the Retirement Advisor Council, a national organization that advocates for successful qualified plan and participant retirement outcomes. She was named a 2017 Top U.S. Retirement Plan Advisor by Financial Times and a 2017 Wealth Advisor Mom by Working Mother and Shook Research. Deana joined Lockton in 2015.

Current and Previous Positions

- Lockton Companies
  - Advisor, Lockton Northeast and Lockton Investment Advisors, LLC
- Calvelli Consulting
  - Principal
- Conduent (formerly Buck Consultants, A Xerox Company)
  - Vice President, Global Client Strategy
- Wells Fargo Institutional Retirement & Trust
  - Vice President & Sales Director, National Accounts

Education

- AB in economics; Duke University

Professional Certifications

- Series 7, 63, 65
- Certified Employee Benefit Specialists (CEBS) certification; Wharton School of Business, University of Pennsylvania
- Accredited Investment Fiduciary (AIF); Center for Fiduciary Studies

Community Involvement

- Executive Leadership Team, American Heart Association, Go Red for Women, 2016-2017
- Forum of Executive Women, former board director
- Haverford School Parents Association, former board member
- Healing Art Works and Women's Way, former board member
- LEADERSHIP Philadelphia, Inc., Fellow

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