



STEVEN J. RILEY

Senior Administrator

Areas of Expertise

Defined Contribution Plan
Recordkeeping and
Administration

Plan Compliance

Interactive Phone and Web
System

Retirement Plan

Steve is a Senior Administrator in the Defined Contribution Recordkeeping and Administration group. Steve joined Findley Davies in 2014. Prior to joining Findley Davies, he worked with BankOne Trust Company in Columbus, Ohio and subsequently JP Morgan Chase Trust Company. He has a background including 13 years' experience in Trust Operations. Steve worked within the asset maintenance and pricing team where he gained extensive industry knowledge ensuring securities were accurately coded and priced on the accounting system. Steve also worked in the corporate actions department becoming a subject matter expert with corporate actions including class actions. He also worked with JP Morgan's Portfolio Accounting group performing accounting services specifically performing allocation and unitized accounting for high net worth clients and non-profit organizations.

As a Senior Administrator, Steve is responsible for managing and processing daily transactions for 401(k) plans, researching and responding to participant inquiries, completing daily and quarterly reconciliations to ensure accurate processing within assigned plans, and providing service to plan sponsors regarding questions relating to their 401(k) plans.

Education

The Ohio State University, Columbus, Ohio — B.S., Human Ecology, Family Financial Planning

University of Phoenix, Columbus, Ohio — M.B.A.

What's Your Passion?

In my free-time, I enjoy my wife and two young sons and teaching the boys the ways of the force, the rules of soccer and video games. When all else fails, you'll find me tinkering with something around the house being an amateur "DIY"er.

Professional and Community Involvement

- Special Olympics, Franklin County Chapter, 2006 to present
- Knights of Columbus, 1999 to present
- Marathon Classic LPGA Tournament 2014 to present

Contact Me

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for a changing workforce*