



Steven R. Parish

President

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Steve Parish, President of Baker Tilly Investment Advisors, LLC, joined the firm in 2003. Steve is a member of the firm's Management and Executive Committees. He was the former head of the Trust and Investment Management Group at a large regional bank, where he had complete P&L responsibility for the \$200 million revenue business.

Specific experience

- > Specific expertise as a portfolio manager, developing tailored investment portfolios (including equity and fixed income security selection and asset allocation) for individual and institutional clients.
- > Former president of a mutual fund company.
- > Extensive experience in developing retirement plan solutions for corporate clients including plan design, investment fund offerings, plan administration and employee communication.

Community involvement

- > University of Wisconsin W Club (UW Football) Past Board Member
- > Wisconsin Special Olympics Past Board Member
- > United Way of Milwaukee Past Board Member
- > Investment Committee Catholic Memorial High School

Education

University of Wisconsin - Madison
Bachelor of Business Administration in Finance