

## Meet David Schon

# David Schon

### Director, Plan Consulting

#### About Me

David Schon brings decades of experience in retirement plan services to his role at Sentinel. He began his retirement services career at TIAA in 1986 and joined Sentinel in 1990. Over the years, David has become a senior member of the Plan Consulting Group, where he manages a team of Plan Consultants, oversees a full caseload of clients and collaborates closely with other managers to drive scale, consistency, and efficiencies across the group.

David is particularly proud of his contributions in helping clients design plans and transition them to Sentinel's in-house recordkeeping platform, improving both the client and participant experience. He also spearheads educational initiatives for the entire Plan Consulting Group through bi-weekly live and interactive sessions, fostering continuous learning and knowledge-sharing. In addition, David regularly leads plan sponsor and committee-level client meetings, guiding discussions on plan provisions and complex compliance matters.

What David enjoys most about his work is the opportunity to use his mathematical, analytical, and interpersonal skills every day to help clients design and maintain effective, compliant retirement plans.

#### Educational Background & Experience

David's educational foundation and professional credentials reflect his deep expertise in retirement plan consulting and administration:

- Master of Business Administration, Concentration in Information Systems, New York Institute of Technology (NYIT)
- Bachelor of Science in Applied Mathematics and Statistics, Stony Brook University
- Professional Designations (ASPPA)
  - Certified Pension Consultant (CPC)
  - Qualified Pension Administrator (QPA)
  - Qualified 401(k) Consultant (QKC)

David remains actively engaged with his alma maters and industry peers through his involvement with the **Stony Brook University Alumni Association**, the **New York Institute of Technology Alumni Association**, and the **ABG Compliance Committee**.

#### Out of the Office

Outside of work, David is an enthusiastic sports fan who loves attending **New York Mets** and **Las Vegas Raiders** games and remains loyal to supporting his teams through all seasons. He is also a devoted fan of live music, especially performances where guitars take center stage.

When he's looking to unwind, David enjoys taking long walks, appreciating the balance of every uphill climb with the reward of an easy downhill stroll.

#### Contact Information



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