



Dave West is responsible for the oversight and management of client relationships, striving to exceed client expectations by delivering excellent service through developing investment policy guidelines, optimizing investment portfolios, selecting investment managers, presenting performance-monitoring reports, and conducting trustee education on a wide range of investment topics. He also helps to ensure clients receive accurate documentation and reports on their timeline,

maintaining current knowledge of each client's manager lineup and general market issues. Dave acts as the primary point of contact in relation to all servicing issues related to the client and is required to be proactive in communication regarding portfolios, firm and Plan issues as they arise. Dave may leverage Mariner's colleagues as required in order to meet the clients' varying needs.

Prior to joining Mariner Institutional, Dave was a consultant at AndCo, an investment consulting firm that was acquired by Mariner. While here, he focused on client service, investment policy development, asset allocation strategy and manager structure implementation as well as plan monitoring, evaluation and advisement. Before that, Dave held various positions at The Bogdahn Group, including Founding Partner Chief Investment Officer, and Senior Consultant.

Dave has a Bachelor of Business Study degree in Finance from Stetson University.



Peter Strong, FSA, EA, FCA, MAAA

Pete Strong is a Senior Consultant located in GRS' Fort Lauderdale, Florida office. Pete has more than 25 years of actuarial and benefits consulting experience. He provides actuarial and consulting services for both public and private sector (middle market) employee retirement systems and OPEB plans.

Pete's pension plan experience includes defined benefit plans and hybrid arrangements, covering plan design features such as final average pay, career average pay, target benefit, and early retirement windows.

His actuarial work covers valuations, GASB/FASB accounting disclosure, plan design studies, experience studies, and cash flow projections. He has particular expertise in

modeling studies including asset/liability studies using deterministic and stochastic approaches.

Pete's regulatory and compliance knowledge includes the Pension Protection Act of 2006 and Internal Revenue Code Sections 401(a), 410, and 415. He also has many years of experience with retiree health valuations related to GASB OPEB and FAS 106.

Pete's knowledge of actuarial software is an added strength. In addition to experience with GRS' internal actuarial software, he has many years of experience working with ProVal and other actuarial valuation systems. He also has experience converting actuarial valuations and models from one valuation system to another. His valuation conversion expertise ensures an efficient and timely transition for new clients during the initial replication process.



Doug Lozen joined Foster & Foster in 1999 and is currently a consulting actuary to over 80 governmental retirement plans in Florida. Doug's experience includes topics such as actuarial valuations, plan redesign studies, Collective Bargaining studies, statutory requirement disclosures, plan experience studies and assumption/method recommendations, actuarial audits, forecasting, and individual retirement benefit calculations. Doug has a Bachelor of Science in Applied Mathematics from Michigan Technological University and a Master of Science in Mathematics Education from Nova Southeastern University. Doug is an Enrolled Actuary under ERISA, and a member of the American Academy of Actuaries.