

ABOUT THE AUTHOR

Kristin Dunlevy

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Kristin V. Dunlevy, QPFC, AIF®, joined Pro-Course Fiduciary Advisors, LLC with over 25 years of broad industry experience through her work for a certified public accounting firm, an actuarial firm, and registered investment advisory firms. As a specialist in 401(k), 403(b), 457 and other institutional retirement plans, Kristin provides plan sponsors with relatable communication, foresight, and customized solutions. Her leadership and industry knowledge of investment management, asset allocation, market strategy, fee and expense benchmarking, service provider searches, and retirement plan design



enables her to fulfill her passion to make retirement plans more effective and align with plan sponsor's overall objectives. Her passion empowers plan sponsor's number one asset—their employees—to reach financial wellness and a financially successful retirement.

Throughout her career, Kristin has served as an investment fiduciary in her roles as a president, principal, managing director, director of research, investment officer, manager, and advisor. Kristin is a published author and has been quoted in local and international publications such as Louisville Business First and London's Financial Times. She serves on the Louisville Employee Benefits Council Executive Committee and currently serves as LEBC's President. She also serves on the American Society of Pension Professionals & Actuaries' Government Affairs Committee.

She earned her Bachelor of Science in Mathematics with Magna Cum Laude from the University of Louisville. She resides in Louisville, Kentucky with her husband and two of their five children.

*Accredited Investment Fiduciary (AIF®) designation