

AUSTIN HACKBARTH

401(K) RELATIONSHIP MANAGER TEAM LEADER

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EDUCATION

Bachelor of Arts, Economics

2010 – 2014

University of Texas at Austin

GPA: 3.9

PROFILE SUMMARY

Over the course of the last decade, I have had an illustrious career as a relationship manager and team leader. During my time with Fisher Investments 401(k) Solutions, I played a key part in scaling our client base from 60 to 2,300 businesses.

This experience provided me with the unique opportunity to partner with executive leadership and play a pivotal role in the development of our business strategy.

WORK EXPERIENCE

401(k) Relationship Manager Team Leader

January 2022 – Current

Fisher Investments

- Managed teams of 10 – 15 employees focused on support client relationships
- Directly responsible for a team supporting 500 clients and 1.2B in AUM
- Expanded capabilities across different platforms (Domo, Salesforce, Excel, SQL, etc.) to help our service department increase efficiency through reporting.
- Continued to support 20 high AUM clients for our most sensitive relationships

401(k) Relationship Manager

August 2016 – December 2021

Fisher Investments

- Managed a book of business of 70+ clients worth 250M in AUM
- Consulted with clients to create optimal plan design based on their business goals
- Annually met with both sponsors and participants onsite to provide educational support.

Private Equity Relationship Manager

May 2015 – July 2016

GLG

- Managed 20 Private Equity for our largest clients representing 2.5M in annual contract value.
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TECHNICAL SKILLS & EXPERTISE

Salesforce

Proficient in Excel

Proficient in Powerpoint

Domo & Data Visualization

ERISA & Compliance

Business Consulting

Capital Markets

Investment Knowledge

Project Management

Relationship Management

Human Capital Management

Retirement Planning