

STEPHEN W. MITCHELL

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SAMPLE CONSULTING ENGAGEMENTS

I've worked with Oculus clients to help them grow their business through providing business and marketing strategy, market and customer data analysis, customer and advisor research, strategic direction to website and investing tool development and product development. Significant recent engagements have included:

- Worked with a large regional bank to develop a 360 degree view and strategy to grow their retirement and investment business, including: market sizing and segmentation; baseline customer and advisor research; product assessment, including competitive review and pricing recommendations; customer education and planning tools; retirement income philosophy and strategy
- Completed a broad market review and assessment of managed account programs for a top mutual fund company
- Worked with a large 401(k) provider to help them retain their largest client. Work entailed enhancing their plan health analysis and developing strategies to help improve progress toward goals, as well as a market review and recommendations for selecting a financial wellness partner
- Developed a white paper to detail the merits of incorporating principal protection strategies in DC plan menus, including an extensive review of the limitations of target date funds and how they performed both during the 2008 & 2009 financial crisis and the subsequent market recovery