



# Qualified Plan Consulting Group

The Deutsch, Smith & Colangelo Group

## The Deutsch, Smith & Colangelo Group - Senior Members of Baird's Qualified Plan Consulting Group (QPCG)

Baird's QPCG is an exclusive collaboration of Financial Advisor teams who have dedicated their businesses to retirement plan clients.

### Michael O. Smith, QPFC, CFP®

#### Director

Michael Smith is a seasoned financial advisor with over 25 years of experience. He holds the belief that disciplined planning and prudent stewardship are key to making good financial decisions.

### Gino P. Colangelo, CMFC®

#### Vice President

As a Vice President with Baird, Gino Colangelo has over 29 years of experience providing financial planning strategies and investment analyses to individuals and foundations.

### Carl Deutsch

#### Vice President

Carl Deutsch is an experienced advisor at Baird, serving clients for over 30 years. His interest in customized, long-term investing has helped multi-generational families with their planning and investment goals.

## We deliver an unbiased objective approach to our clients.

- We have no proprietary requirements.
- We are vendor-, provider- and investment-neutral.
- We use a level compensation methodology to preserve our objectivity.
- The varied businesses of Baird have no bearing on our recommendations for a plan.

## Serving retirement plan clients is our primary focus.

- Our clients come first.
- We believe in specialization and dedication to the retirement plans industry.
- Our provider relationships are broad and significant.
- We offer an independent approach from a financially strong, employee-owned firm.
- Our team leverages the depth and expertise of our Retirement Plan Consulting and Asset Manager Research teams to provide comprehensive solutions and world-class client service.
- We believe in continuous and meaningful education.

*Our goal is to best serve our plan clients, resulting in successful retirement outcomes for participants.*

The logo for Baird, featuring the word "BAIRD" in a bold, white, sans-serif font, set against a blue, trapezoidal background that tapers to the right.

Private Wealth  
Management

# Qualified Plan Consulting Group

Qualified plan consultation is a highly specialized field requiring years of experience and depth of expertise. Baird takes an approach unique from other firms to serve this niche of consulting. We recognize that special knowledge of and dedication to the qualified plan field is paramount to the quality of our services and the success of our clients' plans and their participants.

## Senior Qualified Plan Consultants

Within the Qualified Plan Consulting Group, veteran teams hold a special title recognizing a level of mentorship and commitment to successful retirement outcomes. The Deutsch, Smith & Colangelo has earned and been awarded Baird's prestigious Senior Qualified Plan Consultant title. This honor is given to those teams within the Qualified Plan Consulting Group who have reached the highest level of dedication to qualified plans, evidenced by breadth of client base and service model excellence. Senior Qualified Plan Consultants represent only the very top Baird qualified plan practices in the country.

## A Word About the QPFC Designation

Developed by the American Society of Pension Professionals and Actuaries (ASPPA) and the University of Michigan, the Qualified Plan Financial Consultant (QPFC) program provides an in-depth understanding of retirement planning concepts, terminology, distinctive features of qualified plans and the roles of retirement plan professionals. To earn this credential, one must demonstrate a proficiency in the knowledge of plan administration, compliance, investments, fiduciary and ethics issues, and the completion of continuing education courses is required to maintain the credential.

## Consultative Approach

We serve as independent consultants on retirement plans. The ongoing management of your retirement plan demands attention to detail, as well as valuable organizational and interpersonal skills. We strongly believe in our ability to assist plan sponsors in understanding and managing their fiduciary responsibility.

The Deutsch, Smith & Colangelo Group offer services that support plan sponsors and their participants:

- Fiduciary management assistance
- Plan design consultation
- Investment consulting and reporting
- Vendor reviews and due diligence
- Vendor search and request for proposal services
- Plan conversion assistance
- Expense and revenue analysis
- Participant education and monitoring of its success

Great outcomes are built on culture, enduring values and dedicated teamwork. Trust the deep expertise of the Baird Qualified Plan Consulting Group.

*Specialization, passion and expertise define our commitment to help you achieve success.*

## The Deutsch, Smith & Colangelo Group


Baird

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