Panelist Bios for the July 7, 2021 Asset Management Advisory Committee Meeting

Panel on the Evolution of Advice: Technology-Enabled Personalization

Ed O'Brien, eMoney Advisor

Ed O'Brien sets the tone for eMoney Advisor's success. Since Ed was named CEO in March 2016, eMoney has more than tripled in size. He has over 30 years of experience in finance with a focus on advisor technology. Ed previously served as Senior Vice President and Head of Platform Technology for Fidelity Institutional where he managed the development and operations of platform technologies supporting RIA broker-dealers and family office clients of Fidelity's clearing and custody businesses. Ed led his team to be granted two patents for the innovative technology design used to launch WealthCentral®, Fidelity's platform technology.

Ed received a bachelor's degree from Stonehill College in 1986 and an MBA from Bentley College in 1991.

Jay Lipman, Ethic

Jay Lipman is President, Co-founder and CCO of Ethic, a tech-driven sustainable asset manager. Ethic's platform aggregates financial and sustainability data and empowers advisors to have conversations with their clients regarding nineteen different areas of sustainability. Jay works closely with advisors to personalize passive direct-index portfolios managed by Ethic that incorporate their clients' unique impact priorities and financial goals. Jay has been ranked among the InvestmentNews 40under40, Forbes 30 Under 30: Social Entrepreneurs, and in 2020 Ethic was named by Investment News as one of the 13 Innovative Firms that is changing the way that advice is created, delivered, and used by clients.

Dan Egan, Betterment

Dan Egan is the VP of Behavioral Finance & Investing at Betterment. He uses behavioral science to help people make better financial and investment decisions with technology. Dan has published a variety of applied papers in behavioral economics and lectures at Columbia University, New York University, and the London School of Economics.

Michael Kitces, Kitces.com

Michael Kitces is the Chief Financial Planning Nerd at Kitces.com, dedicated to advancing knowledge in financial planning and helping to make financial advisors better and more successful. In addition, he is the Head of Planning Strategy at Buckingham Wealth Partners, the co-founder of the XY Planning Network, AdvicePay, New Planner Recruiting, fpPathfinder, and FA BeanCounters, the former Practitioner Editor of the Journal of Financial Planning, the host of the Financial Advisor Success podcast, and the publisher of the popular financial planning industry blog Nerd's Eye View. In 2010, Michael was recognized with one of the FPA's "Heart of Financial Planning" awards for his dedication and work in advancing the profession.

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