



Kendall Chance RMC

Regional Manager — Central Region

As the regional manager for the CPI's central region, I am responsible for setting sales strategies and initiatives for my team, which includes retirement plan consultants in Missouri and Colorado. We also lend our expertise to retirement plan advisers and plan sponsors in the states of Kansas, Nebraska, Utah, and Wyoming. With twenty-plus years in the retirement industry, I have experience with both defined contribution and defined benefit plan design and implementation.



In 1992 I joined CPI as the national consulting director for employee stock ownership plans (ESOPs). In that role I helped companies design, install, and utilize ESOP plans. After just two years, I accepted the position of regional manager for CPI's western region, representing CPI with retirement plan sponsors and their financial advisers as they designed and developed their qualified and non-qualified retirement plan programs. A brief stint in the corporate office as national sales director served to remind me that my first love is working directly with retirement plan advisers, plan sponsors, and plan participants, and I accepted my current position in the central region.

My experience with retirement plans, though, did not begin at CPI. I served as president of the business valuation firm, Venture Resource Associates where I performed business valuations, as well as conducting business merger and acquisition transactions. I also served as a Registered Investment Representative for Firm One Securities. I received my B.A. from Saint Mary of the Plains College and I hold the Matrix retirement master consultant (RMC) designation. My wife Jo and I make our home in Wichita, Kansas.