SIMON MICAKAJ, CFP®, C(k)P

RETIREMENT PLAN ADVISOR
Wealth Management

248.458.7041

simon.micakaj@rehmann.com

Wayne State University
BS, finance

While assisting fiduciaries with the management of their plans, and helping participants leverage benefits, my objective is to help all parties remain compliant with legal requirements while also working toward financial goals.

CURRENT ROLE

Simon develops creative strategies that help clients work toward meeting their financial goals, integrating retirement plan services with overall business and financial plans. He works with a cross-functional Rehmann team to proactively guide each client, considering tax law and efficiencies, estate planning, and accounting needs along the way.

SERVICE AREAS

- Retirement plan consulting
- Plan participant education and communication
- Plan design and implementation
- Plan administration

EXPERIENCE

Simon began his financial services career in 2009 and has supported high net worth individuals and their families, business owners, healthcare professionals, and not-for-profit organizations. He has extensive knowledge of retirement plan consulting, participant engagement, education and enrollment, in addition to managing ongoing fiduciary due diligence services provided by Rehmann Wealth.

Prior to joining Rehmann in 2016, Simon worked as a senior personal banker with a large, regional bank.

Simon keeps current on industry standards by attending seminars and graduate level courses offered through professional societies and associations.

A CLOSER LOOK

- Simon is a Detroit Economic Club Young Leader, Troy Chamber of Commerce Committee Member, and Retirement Plan Advisory Group Member.
- For two consecutive years, Simon has been named to National Association of Plan Advisors Top Retirement Plan Advisors Under 40 list (2022-2023).

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