LISA LAMB

MANAGER | RETIREMENT PLAN SPECIALIST
Wealth Management

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Walsh College
BBA, finance

I appreciate building relationships with my clients and assisting participants with taking steps toward their retirement plan goals.

CURRENT ROLE

Lisa helps clients work toward overall retirement readiness through delivery of participant engagement which includes, but is not limited to, education, enrollment services, providing guidance with managing the impacts of life decision leading to a successful and meaningful retirement.

SERVICE AREAS

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

EXPERIENCE

Lisa has been primarily focused on the retirement plan industry since 2004. Her overall financial industry experience spans over 20 years with roles such as financial advisor, personal banker, client relationship manager. Providing participant education remains her passion.

A CLOSER LOOK

- Previously, Lisa had a regular cadence of webinars which she would present to all retirement plan participants through Michigan and Northern Ohio, in addition to presenting retirement planning subject matter to individual retirement plans.
- Lisa stays current with the latest regulatory changes and industry standards by engaging in a variety of continuing professional education opportunities.

Rehmann