BASAM M. MALIK, C(k)P®, CPFA®

PRINCIPAL | RETIREMENT PLAN ADVISOR
Wealth Management

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Michigan State University
BS, biochemistry

"We believe in building strong relationships with clients, participants and plan advisors through education and value-driven service and support, enabling them to work together toward long term retirement readiness goals.

CURRENT ROLE

Basam 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 Centralized Support Services
- Retirement plan consulting
- Plan participant education and communication
- Investment analysis and portfolio design
- Fixed income portfolio design

EXPERIENCE

Basam began his financial services career in 2010 and has supported high net worth individuals and their families, business owners, and organizations. He has extensive knowledge of retirement plan consulting, financial wellness programs and impactful participant engagement.

Basam's experience has qualified him to quickly progress his career. He joined Rehmann in an administrative capacity before transitioning to the trade desk as lead trader, where he executed all securities trades and transactions for the firm. He was responsible for researching, analyzing and recommending investments, and designing, implementing and maintaining fixed income investment portfolios. In 2013, Basam transitioned to his current role as an advisor.

Basam holds the C(k)P® Certified 401(k) Professional designation and the Certified Plan Fiduciary Advisor designation. He holds the Series 7 and 66 licenses.

A CLOSER LOOK

- Basam exhibits the expertise, knowledge and commitment required to act as a plan fiduciary or to help plan fiduciaries manage their roles and responsibilities.
- Basam 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 – ask how he can help you.
- Basam holds an integral role in the ongoing development and implementation of Centralized Support Services in place for Rehmann's retirement plan services, bringing a consistent focus and elevated value for clients firm-wide.

Rehmann