

Rebecca Clark

Bio

Rebecca Clark is a Relationship Manager in Vanguard Retirement Plan Client Services. She provides consultative guidance and support to her clients to address their current and future needs, while directing and collaborating with her administration team to ensure the highest level of quality service. Ms. Clark has nine years of industry experience and previously served as a Relationship Manager managing \$2 billion in assets for Vanguard Nonprofit Endowment and Foundation clients and as a Financial Planner in Vanguard's Advice and Financial Planning division.

Ms. Clark holds the Certified Financial Planner (CFP®) and Chartered Financial Consultant (ChFC®) designations, as well as FINRA Series 7, 6, & 63 licenses. She received her B.S. in Marketing from Northern Arizona University and currently serves on the NAU Franke College of Business Finance Advisory Council. She is located in Scottsdale, Arizona.

1. When did you graduate from FCB? What was your major?

I graduated in 2006 from the FCB – my major with Business Marketing with a minor in English.

2. How has your FCB degree helped you throughout your career?

Experiencing a strong, diverse curriculum of classes outside the area of my major in college has helped me expand my lens when addressing roadblocks or challenges I've faced in my career. I really valued my time in the business college where I had to work on real life case studies (like in the senior capstone) and practice making decisions that have been eerily similar to decisions I've made in my current role at Vanguard. That sort of practice and experience is invaluable!

3. What is your most recent accomplishment?

In my role at Vanguard I work with employers who offer retirement plans for their employees. I recently presented in front of a committee about the importance of low cost investments and transparency in fees. I was able to influence this committee to change their investment lineup to lower cost mutual funds, which will help lower the investment fees passed along to their employees. These changes will literally affect thousands of employees and result in savings of several thousand dollars over each participant's lifetime!

4. Why did you choose to work for Vanguard?

I did not know much about Vanguard when I first joined the company, but what I did know is that they had a strong reputation in the industry for doing the right thing by their clients. This was highly important to me and remains a key reason why I have stayed 10 years later. You may not always know exactly what role you will be taking on, but if you pick an employer that you can believe in, you will be surprised where that job can take you and ultimately end up becoming a career.

5. Brief description of job/responsibilities and your title.

I am a Relationship Manager in Vanguard's Institutional Retirement Plan Client Services group. I work with employers to create competitive retirement plans for their employees. I provide guidance and support to these employers in areas such as investment line-up and plan design as well as lead the internal team of individuals at Vanguard who provide administrative and underlying support to the plan.

6. What do you enjoy most about working at Vanguard?

What I enjoy most about my job is actually being able to see the difference that I am making. When I do my job well, I am able to influence my clients to make impactful decisions for their employees. These decisions ultimately make it possible for thousands of individuals and their families to save for retirement.

7. What is your fondest NAU memory?

My fondest memory of NAU is cardiac hill – the trip from North to South campus! I don't think I appreciated enough at the time the simple pleasure of enjoying the wonderful outdoors on the way to class – and getting a work out at the same time!

8. Can students connect with you on LinkedIn or Email (please provide contact info)?

Yes – I am on LinkedIn

9. What are your interests and hobbies?

I love spending time outside and relaxing with family and friends and two dogs. I enjoy anything around the water and love a good book.