Co Company

Your *team*

LifeMade

John Reese

Head of Canada Retirement,
Executive Sponsor

John brings over 20 years of experience in the insurance and benefits industry, with a focus on strategic leadership and client relations. He earned his MBA from Wharton and has been instrumental in guiding the company's growth by developing innovative insurance and benefits solutions tailored to evolving client needs. As an Executive Sponsor, Jonathan oversees client engagements from a high-level perspective, ensuring a seamless alignment of company resources with client objectives. Known for his visionary leadership and unwavering dedication to client satisfaction, John is a trusted partner in delivering impactful, lasting solutions. In his free time, he enjoys sailing and leading industry workshops on emerging trends in employee benefits.

Michael Clark

Account Executive

Amelia Grant

Vice President, Client Services

With a background in financial services and client management, Michael excels at building strong, long-term relationships with clients and delivering customized benefit solutions that drive value. He holds a Bachelor's degree in Finance from NYU and has a proven track record in managing complex accounts for mid-size to large enterprises. As an Account Executive, Michael is the primary point of contact for clients, responsible for ensuring all aspects of the service experience exceed expectations. He is praised for his proactive approach, keen attention to detail, and commitment to tailoring plans that align with each client's unique goals. Outside of work, Michael enjoys exploring new hiking trails and volunteering at local financial literacy programs.

With over 18 years in the financial services industry, Amelia leads the Client Services division with a client-first approach that prioritizes transparency, responsiveness, and proactive problem-solving. She holds a dual degree in Economics and Business Administration from Stanford University, and her strategic leadership has helped streamline service operations to increase efficiency and client satisfaction. Amelia is passionate about fostering a culture of excellence, and her teams consistently achieve top-rated client satisfaction scores. Outside of work, Amelia is an advocate for financial literacy in underserved communities and enjoys weekend cycling adventures with her family.

Nina Patel

Client Relationship Manager

Nina's career in client relationship management spans more than a decade, with expertise in building trust and delivering tailored benefit solutions that help clients meet their financial goals. She holds a Bachelor's in Business Administration from the University of Michigan and is known for her empathetic approach and thorough knowledge of insurance and retirement planning. As a Client Relationship Manager, Nina serves as a primary liaison for key clients, ensuring their needs are met with precision and care. Nina is also dedicated to advancing DEI initiatives within the company. Outside of work, she enjoys traveling and exploring new cuisines with her friends.

Sophia Lake

Investment Director

With a strong background in asset management and investment strategy, Sophia is responsible for overseeing and optimizing the company's investment portfolios. She holds an MBA with a focus in Finance from Harvard Business School and has extensive experience in crafting high-yield, low-risk strategies that meet clients' retirement and benefit plan goals. Sophia's analytical acumen and forward-thinking approach make her an asset to both clients and the internal investment team. In addition to her role, she is a guest speaker at industry events on sustainable investing. When not in the office, Sophia enjoys painting and hiking with her two dogs.

Dylan Shaw

Implementation Consultant

Dylan is an expert in benefit plan implementation and has been pivotal in helping clients smoothly transition to new group retirement and insurance plans. With a degree in Business Administration from the University of Texas and certifications in project management, Dylan specializes in coordinating multi-departmental teams to ensure that clients' onboarding processes are timely and efficient. As an Implementation Consultant, he works closely with clients to tailor solutions that fit their needs and guide them through every step of the process. His clients appreciate his ability to anticipate challenges and his thorough, hands-on approach. Outside the office, Dylan is an avid cyclist and enjoys organizing community events to promote health and wellness.

Emma Lewis

National Education Consultant

Emma is dedicated to empowering clients with the knowledge they need to make informed decisions about their insurance and retirement plans. With a Master's in Education and a background in financial consulting, she excels at distilling complex concepts into clear, engaging workshops and one-on-one sessions. Emma's approach is both compassionate and client-centered, allowing her to connect with a diverse range of clients and provide education that aligns with their unique needs. Known for her engaging seminars, she has a talent for making finance approachable. Outside of work, Emma is an avid gardener and regularly volunteers at local educational nonprofits.

Laura Towns

Head of LiveRight

Laura has over 20 years of experience in retirement planning and benefits, specializing in innovative retirement solutions that enhance financial wellness for clients. She holds a degree in Finance from the University of Pennsylvania and has overseen the retirement division for several Fortune 500 companies. As the Head of Retirement, Laura is responsible for strategic planning and ensuring the delivery of retirement solutions that align with clients' long-term financial goals. Her collaborative leadership style and client-centric strategies have earned her a reputation as a leader in the retirement industry. In her free time, Laura enjoys hiking and is involved in mentorship programs for women in finance.

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