



TARA L. MASHACK-BEHNEY, CFP®,
ChFC®



DIRECTOR OF INVESTMENT
CONSULTING

taramashack-behney@conradsiegel.com

Expertise:

- Specialist in investment consulting for all types of retirement plans including defined benefit pension plans, defined contribution retirement plans, and 403(b) plans
- Works with private sector employers, tax-exempt organizations, large associations, and foundations
- Proficient in setting investment policy statement objectives and guidelines, investment selection, portfolio analysis and performance evaluation, monitoring and reporting, and employee education

Firm Participation:

- Chair, Investment Committee
- Member, Marketing Committee
- Joined **Conrad Siegel Investment Advisors, Inc.** in 2002

Prior Experience:

- Worked in the trust department of a central Pennsylvania financial institution

Educational Background:

- B.S. degree in economics
Dickinson College

Affiliations/Activities:

- CERTIFIED FINANCIAL PLANNER™ Professional
- Phi Beta Kappa, Dickinson College
- Society of Financial Services Professionals
- Investment Adviser Representative of **Conrad Siegel Investment Advisors, Inc.**