

# Barry P. Benjamin

Baltimore, Maryland Area

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## **CAREER SUMMARY**

Accomplished executive with broad asset and wealth management industry experience. Executive career path in PricewaterhouseCoopers' Asset and Wealth Management (AWM) industry sector, with a focus on business strategy, operations and growth. Extensive board level experience and understanding of governance issues. Led PwC's Asset and Wealth Management sector in the US for 10 years and PwC's Global Asset and Wealth Management sector for 8 years.

## **PROFESSIONAL EXPERIENCE**

### **PricewaterhouseCoopers LLP**

International professional services firm and the market leader in providing assurance, tax and advisory services to the asset and wealth management industry in all major financial services markets globally. PwC's global AWM sector practice consists of over 250 partners and 3,000 client service professionals delivering over \$4 billion in revenues.

- Global AWM Sector Leader (2010 to 2017) and US AWM Sector Leader (2006 – 2015)
  - Developed and led PwC's AWM sector "go to market" strategy across all lines of professional services (assurance, tax and advisory) spanning over 20 countries.
  - Served as senior relationship partner managing relationships with senior management and boards of PwC's global asset and wealth management clients.
  - Developed best in class market intelligence and produced world class thought leadership.
  - Expanded PwC's AWM capabilities to include market leading mutual fund, ETF and alternative funds practices, leading edge use of technology in assurance and tax services and global advisory and transaction services.
- Managing Partner of PwC's Baltimore office (2000 – 2005)
  - Responsible for all aspects of the firm's Baltimore market practice, grew office from 100 professionals to over 250 professionals.
- Client Service Partner based in Boston (1991 – 1997), Kansas City (1997 – 2000) and Baltimore (2000 to present)
  - Served many of the leading global asset and wealth management firms including, Fidelity, State Street, American Century, DST, Ameriprise, T. Rowe Price, Vanguard, and Legg Mason.
  - Recognized subject matter expert on fund accounting and transfer agent operations, risk management and fund governance matters.

***PROFESSIONAL QUALIFICATIONS***

- **Certified Public Accountant**, Licensed in Massachusetts and Maryland
- **American Institute of Certified Public Accountants**, Member
- **Maryland Society of Certified Public Accountants**, Member

***EDUCATION***

- **Boston College**, Bachelor of Arts (A.B.) in Economics and Sociology, 1979
- **Northeastern University**, Masters of Business Administration (M.B.A), 1981
- **AACSB International Bridge Program at UCLA Anderson School of Management**, Certificate for Instructional Practitioner faculty member, June 2017

***INDUSTRY BOARDS***

- **National Investment Company Services Association (NICS)**, Board of Directors, Treasurer (2011-2016)

***COMMUNITY INVOLVEMENT***

**Business Volunteers Maryland**

- An organization founded in 2001, devoted to driving civic engagement and connecting motivated people and businesses to nonprofit organizations leading to stronger communities in the Greater Baltimore community.
  - Board Chairman (2013-2017)
  - Trustee (2003-2008) and (2010-present)

**Literacy Works**

- An organization focused on improving literacy in the adult population of Baltimore City and Baltimore County.
  - President/Board of Directors (2002-2006)