

FIDUCIARY ADVISORS INC.

REGISTERED INVESTMENT ADVISOR

Natalie K. Schaefer, CPA

Consultant

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Ms. Schaefer, drawing on 29-plus years of experience in the St. Louis business community, currently provides consulting services to fiduciaries of retirement plans and trusts, with emphasis in compliance with fiduciary standards for investing and/or with plan or trust documents.



Prior to joining Fiduciary Advisors, Inc. in 2008, Natalie was employed by RubinBrown, LLP. During her 18-year plus tenure, Natalie served RubinBrown as an auditor and as an ERISA pension plan administrator with the firm's Benefits Group, LLC. During her two most recent years with RubinBrown, Natalie performed ERISA-required audits of qualified pension plans.

Prior to joining RubinBrown, LLP in 1989, Natalie was employed by Edward Jones as a manager and limited partner. She began her career at Edward Jones as an internal auditor in 1982 and in 1987 became a registered representative of the firm.

Natalie earned her Bachelor of Science in Business Administration at University of Missouri – St. Louis and graduated with Summa Cum Laude honors in 1979. She went on to earn her CPA certificate while an auditor for Ernst & Whinney (now Ernst & Young), joining the firm in 1979.

Licenses and Registrations

- Missouri State Board of Accountancy – Certified Public Accountant
- Fiduciary360, Accredited Investment Fiduciary® (AIF®) – Designee
- Security and Exchange Commission – Registered Investment Adviser Affiliate (Series 65)

Professional Affiliations

- AICPA, Member
- MSCPA, Member