



Annie Taylor, CFA

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Annie Taylor is the head of Verus's Taft-Hartley consulting practice. She is also a member of the management committee, which sets the overall strategic direction of the firm, and the OCIO Investment Committee, which oversees discretionary services. Taylor has more than 20 years of experience advising Taft-Hartley trusts and other types of institutional retirement plans. She assists these clients with strategic planning and program implementation of their defined benefit and defined contribution plans, health and welfare trusts, and apprenticeship and training funds. Taylor joined Verus in 2003 as a performance analyst in the Seattle office and moved to the Los Angeles office in 2005. She has been a shareholder of Verus since 2009 and assists with business development in addition to her consulting and management duties. Taylor is a well-recognized member of the institutional investment industry, particularly in the Taft-Hartley space. She has spoken at many key industry conferences, including the International Foundation, Made in America and the National Benefits Forum. She is a former member of the Investment Management Committee of the International Foundation of Employee Benefits Plans (IFEBC) and continues to be a contributing member of the Foundation. Taylor also formerly served as financial director for Joan's Wish List, a private foundation that supports survivors of domestic violence. Taylor graduated cum laude from Central Washington University with a bachelor of science degree in finance and a minor in economics. She earned her Chartered Financial Analyst (CFA®) charter in 2007 and is a member of the CFA Institute as well as the CFA Society of Los Angeles.