Stuart Herskowitz, CRC, AIF®

Stuart Herskowitz is Vice President of Retirement Services at USI Consulting Group (USICG). In this role, he is responsible for helping small and middle-market companies, non-profits and municipal entities with a wide range of institutional Defined Benefit and Defined Contribution plan issues. Stu's specialties include working with tax exempt and private sector employers to identify challenges and deliver effective solutions that help clients achieve their goals, including optimizing benefits, minimizing costs and enhancing client relationships. As an Accredited Investment Fiduciary (AIF®), he also consults with clients to review and assess their fiduciary processes and practices.

Prior to joining USICG, Stu served as Shareholder and Senior Vice President of Client Relations for Hooker & Holcombe, a full-service actuarial, institutional investment advisory and retirement plan consulting firm. In this role, he sourced, coordinated and transitioned new clients, working closely to ensure their satisfaction. As a shareholder, he played a leading role in strategic planning and growth of the firm. Hooker & Holcombe was acquired by USI Consulting Group in 2023.

With more than 35 years of experience in the retirement industry, his experience spans a multitude of industries including banking, construction, education, private equity, manufacturing, non-profits, professional services (i.e., accounting/law firms), medical practices, retail, technology, and utilities.

Stu graduated with a Bachelor of Science from William Paterson University. Industry education and designations include: Certified Retirement Counselor (CRC), Accredited Investment Fiduciary (AIF®) and FINRA administered Series 6, 26 and 65 securities licenses.

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Partner and Vice President
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