

Former Schwab and IN Adviser Solutions Executive Joins Pepin Consulting

/EINPresswire.com/ Kelli Cruz to Bring Extensive Human Capital and [Succession Planning](#) Experience to Wealth Management Industry-Focused Consulting Firm

Pepin Consulting, a leading human capital consulting firm, announced today the appointment of Kelli Cruz to the position of Managing Director. Kelli will oversee Pepin's expanding human capital planning practice and the design and implementation of specialized talent management solutions.

Also joining Pepin Consulting is Jennifer Specter, a 15-year practice management veteran with previous experience at Schwab Advisor Services and IN Adviser Solutions in a variety of consulting and program management roles. Jennifer will be responsible for managing client engagements and overseeing the operations of the firm.

Ms. Cruz will be based in the San Francisco Bay Area and Ms. Specter will be based in Reno, Nevada.

"We are extremely pleased to welcome such highly-respected, knowledgeable professionals as Kelli and Jennifer to our team," said Scott Feraro, Managing Director and founder of Pepin Consulting. "Kelli and Jennifer bring a tremendous wealth of experience, working with the most successful RIAs and custodians in our industry. They will significantly enhance our ability to serve this rapidly expanding segment of financial services."

Ms. Cruz brings a unique heritage of human capital management knowledge for advisory firms from her experiences at Schwab Advisor Services where she pioneered the industry's first human capital practice management program and most recently with InvestmentNews conducting the biannual IN/Moss Adams research studies including their inaugural Succession Planning study.

"As succession planning and talent management become even more critical business issues for financial advisors due to the changing demographics of the industry, I am looking forward to expanding Pepin's reach and capacity into providing the key solutions advisors will need to ensure the continuity of their businesses," said Ms. Cruz. "Our model will not just be to provide information and content, but to actually work directly with advisory firms in implementing solutions that work."

Prior to working at Schwab and IN Adviser Solutions, Ms. Cruz ran Human Resources for Wells Fargo Private Client Services Group and was also the founding Director of Human Resources for Wells Capital Management. Kelli joins Scott Feraro who prior to founding Pepin was the Managing Principal with the Seabury Group providing solutions to the global financial services industry, and Managing Director of HR Global Services Group where he worked on global planning and design engagements for mergers, acquisitions and reorganization initiatives.

Pepin Consulting is an independent consulting firm dedicated to providing human capital consulting services to the wealth management industry. Pepin has a proven track record of successful human capital engagements addressing:

- Succession planning - ownership agreements and buy/sell protocol, change-in-control planning, exit-plan design and implementation, and ownership [compensation](#) plans.
- Compensation - peer group benchmarking and total cash compensation analysis, short-term incentive design, and long-term phantom stock options plan design.
- Talent and [performance management](#) assessment tools and programs.

For more information, please visit www.pepinconsulting.com.

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