

Meet the DWC Sales Team

Pete Schrodle, Head of TPA Sales

Pete Schroedle is a seasoned retirement plan executive with nearly 36 years of experience in the retirement and investment marketplace. Throughout his career, he has built a reputation as a strategic leader, team builder, and trusted partner dedicated to helping financial advisors and plan sponsors achieve long-term success. His experience spans sales leadership, business development and distribution strategy, providing him with a comprehensive understanding of the retirement plan industry and the challenges facing today's employers and advisors.

As Head of TPA Sales for DWC The 401k Experts, Pete leads initiatives focused on expanding strategic partnerships, strengthening advisor relationships, and supporting the continued growth of DWC's national retirement plan practice. Prior to joining DWC, he held senior leadership positions with nationally recognized retirement providers, including OneAmerica and Principal Financial Group, where he spent decades driving growth, developing high-performing teams, and delivering retirement plan solutions across the country. Pete's leadership philosophy centers on building meaningful relationships, fostering collaboration, and helping organizations create retirement plans that enhance outcomes for both businesses and participants.

Doug Hoefer, National Sales Director

Doug Hoefer is a founding partner of DWC The 401k Experts and has spent more than two decades helping businesses, advisors, and retirement plan sponsors achieve successful outcomes through effective plan design, administration, and consulting. Since co-founding DWC in 1999, Doug has played an important role in the firm's growth and evolution, helping establish a reputation for exceptional service, technical expertise, and practical guidance in an increasingly complex regulatory environment. His extensive experience allows him to help clients simplify retirement plan challenges while maintaining a focus on long-term participant and business success.

As a partner at DWC, Doug works closely with advisors and employers to develop retirement plan strategies that align with organizational goals while supporting employee retirement readiness. He is known for translating complex retirement plan concepts into actionable solutions and has shared his expertise through industry discussions and educational

presentations on topics including retirement plan legislation and compliance. A graduate of the University of Minnesota with a degree in Economics, Doug remains committed to strengthening advisor relationships and helping retirement plans operate efficiently and effectively.

Sales Consultants

Zach Allyn

Zachary Allyn is a Senior Sales Consultant with DWC and has more than 15 years of experience in the retirement plan and defined contribution industry. Throughout his career, he has specialized in helping financial advisors, plan sponsors, and retirement professionals identify effective retirement plan solutions while building long-term, trusted relationships. Before joining DWC, Zach held progressively senior sales roles at Transamerica Retirement Solutions, including Regional Vice President and Assistant Vice President of Sales, where he worked closely with advisors and retirement plan professionals across the country.

At DWC, Zach leverages his extensive industry knowledge and network to help advisors and plan sponsors navigate the complexities of retirement plan administration and design. Known for his consultative approach and commitment to client service, he is passionate about delivering practical solutions that help organizations achieve better retirement outcomes for participants.

Cory Bender

Cory Bender is a Sales Consultant with DWC who has more than 18 years of experience in the retirement plan industry. Throughout his career, Cory has worked across multiple facets of retirement plan administration, beginning in compliance and plan analysis before advancing into business development and sales leadership. Prior to joining DWC, he spent more than a decade with Retirement Strategies Group, where he served as both a Plan Analyst and New Business Specialist, helping advisors and plan sponsors navigate retirement plan design, compliance, and implementation strategies. His industry credentials, including Enrolled Retirement Plan Agent (ERPA), Accredited Pension Administrator (APA), and Accredited Pension Representative (APR), reflect his deep technical knowledge and commitment to the retirement plan profession.

At DWC, Cory partners with financial advisors, recordkeepers, and retirement plan professionals to develop customized retirement plan solutions that support business growth and improve participant outcomes. His unique background combines hands-on plan administration expertise with a consultative sales approach, allowing him to provide practical insights into plan design, proposal development, and implementation strategies. Having spent much of his career serving advisors throughout the Gulf South region, Cory has built strong industry relationships and a reputation for delivering responsive, knowledgeable support.

Ben Kauffman

Benjamin Kauffman is a retirement plan sales professional with a passion for helping organizations create stronger retirement outcomes and more confident financial futures. His career has been focused on serving the retirement plan marketplace, where he has gained experience across advisor support, client engagement, transition management, and retirement plan consulting. This diverse background gives him a well-rounded understanding of the needs of financial advisors, plan sponsors, and participants, enabling him to provide practical solutions and exceptional service.

As a Sales Consultant with DWC The 401k Experts, Ben works closely with advisors and business leaders to identify retirement plan solutions that align with organizational goals while supporting long-term participant success. Prior to joining DWC, he held several retirement-focused positions with Transamerica, where he advanced through increasing client- and advisor-facing roles, building expertise in relationship management and retirement plan operations. A graduate of Iowa State University's College of Business with a degree in Finance, Ben brings a client-centered approach, strong industry knowledge, and a commitment to helping advisors and employers navigate today's evolving retirement plan landscape.

Rick Nahill

Rick Nahill is our DWC Northeast Sales Consultant and a seasoned retirement industry professional with more than two decades of experience helping financial advisors, plan sponsors, and retirement plan professionals grow and strengthen their retirement plan practices. Throughout his career, Rick has focused on building trusted relationships and delivering strategic retirement plan solutions that help advisors better serve their clients. Before joining DWC, he spent more than 20 years with John Hancock, most recently serving as External Retirement

Business Development Director for New England and Upstate New York, where he developed a strong track record of new business growth and advisor engagement.

As Northeast Sales Consultant, Rick works closely with financial advisors, recordkeeping partners, CPAs, and retirement plan professionals to expand DWC's presence throughout the region. His extensive industry knowledge, deep understanding of the retirement plan landscape, and longstanding relationships within the advisor community make him a valuable resource for helping firms identify opportunities, design effective retirement plan strategies, and navigate an evolving regulatory environment. A lifelong Boston-area resident, Rick briefly fled the snow, rain, and humidity to spend three and a half years as John Hancock's Southern California Business Development Director—only to realize he missed it all. Now back home, he is deeply passionate about supporting advisors to grow their practice and helping business owners create workplace retirement plans that achieve better outcomes for everyone involved.

Tom Smith

Tom is a seasoned retirement plan professional who is passionate about bringing together the right people and innovative solutions to address the complex challenges facing retirement plan sponsors and advisors. Throughout his career, he has successfully supported the growth of retirement plan businesses from multiple perspectives, including investments, recordkeeping, and plan administration. His broad industry experience allows him to provide valuable insight and strategic guidance to advisors, CPAs, business executives, and retirement plan stakeholders.

As Midwest Sales Director for DWC The 401k Experts, Tom partners with leading recordkeeping firms, financial advisors, and business professionals to deliver tailored retirement plan solutions designed to improve participant outcomes, strengthen plan operations, and maximize tax efficiency. DWC's comprehensive service model includes retirement plan administration, consulting, and optional 3(16) fiduciary services, all built on a foundation of responsive, accurate service. Backed by an organization that serves more than 10,000 defined contributions and defined benefit retirement plans nationwide, Tom leverages his extensive leadership, sales, and service experience to help clients achieve long-term retirement plan success.