



DAN BIRD

Relationship Manager

Dan Bird joined ClearPoint in January 2018, bringing over 15 years of experience in institutional client service, trust, recordkeeping and investments.

Prior to joining ClearPoint, Dan was a Relationship Manager with Transamerica Retirement Solutions where he assisted clients with plan design, investment monitoring, employee education, fiduciary support, and plan compliance for all types of corporate and not-for-profit plans.

Dan has a BA from Miami University (Oxford, OH) and the Certified Employee Benefit Specialist (CEBS) professional designation. He is currently on the board of directors of the Southwest Ohio Chapter of the International Society of Certified Employee Benefits Specialists (ISCEBS).

As Relationship Manager for ClearPoint, Dan is responsible for delivering high quality service to ClearPoint trust clients in the areas of administration, investments and compliance.