

# Lisa Tassara

Charles Schwab Client Services

*Own your tomorrow™*



**Lisa Tassara**  
**Managing Director**

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## Professional Profile

As Managing Director of Client Services within Schwab Retirement Business Services, Lisa oversees and is responsible for the Client Services teams. Lisa assumed responsibility for our Client Services team which includes on-boarding new clients and accounts, as well as the daily servicing of all of our Third Party Administrators, Plan Sponsor and Advisor clients. Charles Schwab Bank provides comprehensive and flexible trust and custody services that are specifically designed for qualified and non-qualified retirement plans.

Lisa also acts as a spokesperson regarding retirement plan fraud and by helping to educate our clients on trends and best practices.

Lisa serves on the SPARK Data Security Oversight Board (DSOB) and Defeating Fraud Committee. Lisa is also a member of the Investment Company Institute (ICI) Bank, Trust and Retirement Advisory Committee (BTRAC).

## Experience

Lisa joined Schwab in January 2014 as Managing Director of Asset Operations. Lisa assumed responsibility for the Client Services teams in 2015.

Prior to joining Schwab, Lisa worked at Putnam Investments where she managed teams responsible for delivering operational client support for back offices and advisors of intermediary firms in the financial advisor, broker dealer, bank, and bank trust channels. Lisa also spent eight years with Fidelity Investments Advisor channel where she managed teams responsible for servicing institutional clients. Lisa also held a role in the marketing group and was responsible for all portfolio manager webinars with the advisor clients.

## Education

- ❖ Bachelor of Science Degree in Management from Lesley University
- ❖ Master of Business Administration in Marketing from University of Phoenix

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