



Our Presenters Biographies

Bill Stuart

Bill Stuart has more than 20 years of sales and marketing experience in the health care and consumer packaged goods businesses. He has been at Harvard Pilgrim for 11 years, the last four as a product specialist. In this role, he educates benefits advisors, employers and employers about tax-advantaged reimbursement vehicles, including Health Savings Accounts, Health Reimbursement Arrangements and Flexible Spending Accounts. He is a graduate of Bowdoin College and holds an MBA from Duke University.

Keith Forrest

Keith serves as a consultant to Fortune 500 Life Insurance Companies & Insurance Producers. He previously worked for Union Mutual & UNUM Corp., Portland, Me. From 1981-1998. He served as Vice President & Chief Economist. Keith was on the Investment Management Committee and was a Public Spokesperson On All Matters Relating To The U.S. Economy And External Environment. He attended Penn. State University, B.S. - College of Earth & Mineral Sciences in 1969 and then Long Island University, MBA (Honors) in 1976. Keith is married to Linda, for 34 years and they have two sons: Matthew, residing in Plaistow, New Hampshire; Jonathan, residing in Clearwater, Fla. Keith is the unofficial ambassador for Penn. State University programs in women's athletics, the School of Music, and Penn. State Hershey Medical Center (Four Diamonds Children's Cancer Program).

Joe Beasley

Joe graduated from Macalester College and majored in Economics and Political Science From 1984 - 1994, He worked in Boston for ReliaStar (later purchased by ING) in various Group Insurance sales positions. He then was the ReliaStar National Sales Manager for Alternative Distribution from 1994 - 1996. From 1996 to present, he works on the Regional VP Worksite Marketing for ReliaStar (later ING Employee Benefits after ING purchase). Joe currently resides in Haymarket, VA and is married with two children who are 9 and 11 years old.

Kelly Reey

Kelly Reey is the retirement plan consultant for the New England and New York region. Mrs. Reey has been a qualified plan consultant since 1993 and joined Invesco Aim in 2000. She has spent the better part of her career advising registered investment advisors, consultants and large institutional clients. Mrs. Reey earned a bachelor's degree in economics with a minor in finance from Purdue University. She is a FINRA Series 6, 7, 63 and 66 registered representative.