



Mark Anderson

Volunteer Consultant
Consultant Since: 2018

OneSource
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Professional History

- Fidelity Investments
- Wells Fargo (formerly Norwest)
- Minnesota Mutual Life Insurance

Education

- B.A., Public Administration, B.A., Business Administration, Winona State University

Certification

- FINRA General Securities License

Mark is a licensed securities executive with special expertise in the retirement financial services industry. Prior to his retirement, he was Vice President—Managing Director at Fidelity Investments. In that role he oversaw and administered 401 (k) institutional plans with assets in excess of \$4.2 billion. Mark’s responsibilities included strategic planning, pricing, compliance, risk assessment, and communications. Fidelity Investments recognized his special achievements by awarding him two President’s Circle Awards for exceptional sales and service.

Mark recognizes the importance of a strong partnership of both public and private enterprises. To that end, he is a former city Planning Commissioner of Burnsville, Minnesota. He also marshalled a strategic planning effort for St. Timothy Church in Union, Kentucky. Mark currently volunteers with SCORE.

OneSource Experience

Mark assisted with a strategic planning project for Big Brothers & Big Sisters of Butler County. As part of the People’s Liberty Leadership Training Project, he helped create and deliver a workshop for new nonprofits on developing and maintaining financial viability. Most recently he assisted Cincinnati Boy Choir to develop a financial plan.