

## Peter L. Dinardi, CPA, MBA



### Principal, Founder, BOLI Strategic Partners

Prior to Peter's founding of BOLI Strategic Partners, LLC, he was the Executive Vice President and Chief Financial Officer of New York Life Executive Benefits LLC (NYLEX Benefits), a company specializing in the design, implementation, financing and providing of ongoing administrative support of supplemental executive benefits programs.

In early 2013, BOLI Strategic Partners assumed the Bank Owned Life Insurance operations of NYLEX Benefits which was a subsidiary and the executive benefits consulting arm of New York Life Insurance Company, a Fortune 100 company and the largest mutual life insurance company in the United States. \*\*

BOLI Strategic Partners is dedicated to working with community banks to provide efficient strategies to offset employee benefit expenses. BOLI Strategic Partners, LLC is a nationally recognized vendor of Bank Owned Life Insurance providing services to banks throughout the United States.

Prior to Mr. Dinardi's founding of BOLI Strategic Partners and his position with NYLEX Benefits, Peter was a Managing Director at New York Life Investment Management, LLC (NYLIM). As Managing Director, Peter managed the operations and financial reporting of Retirement Services, a division of NYLIM responsible for the sale and servicing of qualified retirement plans including 401(k) plans and defined benefit pension plans. Peter was also a senior officer of several financial services companies including: Goldman, Sachs & Co., where he served as a Vice President of the Financial Division; UAM Retirement Plan Services Inc., a subsidiary of the former United Asset Management, where he served as Senior Vice President and Chief Financial Officer; and River Bank America, formerly a New York State savings bank, where he served as Executive Vice President and Chief Financial Officer. Peter started his career as a senior auditor with Arthur Andersen & Company.

Peter is a graduate of the State University of New York at Albany and has graduate degrees from Pace University (MBA) and IONA College (Advanced Professional Certificate). Peter is also a Certified Public Accountant (CPA). In addition, Peter has served in numerous other leadership roles, including:

- Treasurer of the Iona Preparatory School Fathers Council
- Coach of the Westchester Hawks, an AAU boys basketball team
- Former member of the School Board of the Holy Rosary Elementary School
- Former Chairman of the Computer Technology Committee of Holy Rosary Elementary School
- Co-founder and Director of the Volleyball Program at the Holy Rosary Elementary School
- Former member of the Board of Directors of the American Youth Soccer Organization (AYSO) for the Town of Mount Pleasant (Westchester, New York)
- Former volunteer for New York Life Insurance Company's - Volunteers for Life

Neither BOLI Strategic Partners, Jeff Marsh, Peter Dinardi, Margit Parish, New York Life Insurance Company nor its affiliates provides tax, legal or accounting advice. Please consult your own tax, legal or accounting professional before making any decisions. BOLI Strategic Partners, LLC is not owned or operated by New York Life Insurance Company, NYLIFE Securities LLC or their affiliates. Peter Dinardi is a Registered Representative of and offers securities products & services through NYLIFE Securities LLC, Member FINRA/SIPC, A Licensed Insurance Agency. \*\*New York Life is the largest mutual insurance company based on the Fortune 500 ranking within industries for insurance: Life, Health, (Mutual) Fortune Magazine, 7/16/18.

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