



Jason Speich, MBA, CPA, AIF
Ronald McDonald House Charities of Madison Board of Directors

Jason is the Director of Retirement Planning at Next Level Planning and Wealth Management, a financial advising firm specializing in retirement planning, 401(k) plan design, ERISA regulations and employee education. He holds the FINRA series 7 and 66 registrations through LPL Financial and the Accredited Investment Fiduciary designation. Past experiences include practicing as a CPA with at Grant Thornton in consulting, audit and internal controls and serving as CFO for an environmental company providing pollution control solutions around the world.

He attended Indiana University, earning a Bachelor of Science in Finance, followed by the University of Wisconsin-Madison, earning a master's degree in Business Administration.

Jason is a CPA with audit and internal controls experience. He served as Treasurer on The Rainbow Project Board for over 10 years and assisted in the management of over \$1.2B in assets, both institutional (401K/Deferred Compensation) and individual in nature. He also was a board member of Headrush.

Born and raised in Milwaukee, Jason strayed from Wisconsin for four years of college and two years of international experience but landed in Madison in 2000 for a MBA program and, like most people who move to Madison, became a "lifer." His wife, Marcella, is a positive behavioral specialist for the Madison School District and has a private yoga business. They have three children, Thomas (19), Will (17) and Ivy (13).

Jason's intent is to support for a non-profit that ultimately serves children and found RMHC-Madison to be a natural fit.