



Biography

Kathryn Jordan Capage Director of Retirement Research



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Director of Retirement Research

Kathryn Capage is director of retirement research for Invesco. Ms. Capage uses her wealth of knowledge and experience in the marketing, design and administration of qualified plans to speak on the ins and outs of retirement and educational plans. Her incisive presentations cover topics ranging from the intricacies of recent tax law changes to ideas to bolster 401(k) participation. Her expertise in regard to the Employee Retirement Income Security Act (ERISA) extends from tax laws to actuarial calculations required when designing plans.

Before joining Invesco in 1997, Ms. Capage was the compliance officer for a large trust company that administered more than half a million IRA, SEP, KEOGH, 403(b) and full-service 401(k) plans. Ms. Capage earned her employee benefit specialist certification through the Wharton School at the University of Pennsylvania.

As one of Invesco's most frequently requested speakers, Ms. Capage travels extensively throughout the United States. She has been invited to speak before the U.S. Department of Labor, was the keynote speaker at Ohio State University's financial planning center opening and has been a featured speaker at the American Society of Pension Professionals & Actuaries (ASPPA) and Investment Company Institute (ICI) conferences. Ms. Capage has been featured on numerous regional radio broadcasts and has published articles in many professional journals, including *Pension & Investments*, *Defined Contribution News* and *Investment News*. Her common-sense approach to the challenging arena of retirement plans makes her an engaging speaker.