



Lisa Margeson
Managing Director, External Affairs
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Lisa Margeson is Managing Director, External Affairs, for Bank of America's Retirement & Personal Wealth Solutions. She is responsible for the multi-channel engagement strategy for the Office of Retirement Thought Leadership, which provides valuable insight to the firm's Financial Life Benefits program, an integrated solution that supports employees' complete financial needs and helps them take control of their financial lives. She was previously Head of Retirement Client Experience & Communications, where she led the team responsible for the firm's institutional retirement financial wellness program, as well as integrated and multi-channel communication and education benefit program campaigns.

Lisa serves as a Member of the Board of Trustees of the Employee Benefit Research Institute (EBRI) based in Washington, DC. EBRI is a private, nonpartisan, nonprofit research institute that focuses on health, savings, retirement and economic security issues.

Prior to joining Bank of America, Lisa served as Head of Marketing and Creative Services for Voya Financial Retirement Solutions (formerly ING U.S.) for eight years. Prior to Voya/ING, she spent 13 years at CitiStreet (a joint venture between State Street and Citigroup) and State Street, serving as CitiStreet's Chief Marketing Officer at the time of acquisition by ING. Previously, Lisa spent nine years at Fidelity Investments as Director of Institutional Bank Marketing; she also worked as an account representative at a Boston-based financial planning and investment management firm where she held a variety of client and investment portfolio service positions.

Lisa earned a Bachelor's Degree in Math-Economics from Brown University in Providence, Rhode Island and a Master's Degree in Business Administration from Boston University. She works in the firm's Boston office and holds FINRA Series 7, 66 and 24 licenses.