2023

RETIREMENT INDUSTRY TRUST ASSOCIATION

Institute Instructors

RITA IRA INSTITUTE 2023

INSTRUCTOR

MARY MOHR, MBA, JD

Executive Director, RITA

Mary L. Mohr is the Executive Director of the Retirement Industry Trust Association. She was the founder of RITA in 1987 when she saw the need for a single voice for the self-directed retirement industry. Mary has a law degree and an MBA from the University of Denver and a Bachelor of Arts degree in English literature from Gettysburg College where she graduated cum laude. She worked as a Senior Vice President for First Trust/FiServ Trust Company in Denver and was the President of the Institutional Trust Company, a subsidiary of the Invesco/AIM mutual fund complex. Mary also served as the trust company representative on the Colorado State Bank Board for 12 years and also Chaired the Board.

Mary founded the Savings Coalition of America in Washington, DC which was responsible for legislation enabling the creation of the Roth IRA. Mary organizes and teaches at the IRA Institute, RITA's educational program, which provides instruction and experiential learning for retirement industry employees. She is a frequent speaker at industry conferences and also serves as an expert witness in litigation cases affecting the industry.

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JENNIFER ABERNATHY, ESQ.

Founder & Attorney, Abernathy Law Office

Jennifer Abernathy is an attorney with more than twelve years of experience working as in-house counsel and compliance in the SDIRA industry. Ms. Abernathy recently founded the Abernathy Law Office to provide creative and practical legal and compliance consulting services. She is passionate about data privacy, cyber security, and fraud prevention, and has obtained the Certified Information Privacy Professional (CIPP/US and CIPP/E) and Certified Information Privacy Manager (CIPM) designations through the International Association of Privacy Professionals (IAPP).

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SCOTT SCHWARTZ, ESQ.

EVP & General Counsel, Delaware Depository

Scott Schwartz is the EVP & General Counsel for Delaware Depository. Delaware Depository is a state-chartered trust company that provides precious metals safekeeping, reporting, and shipping services for IRA custodians, commodity exchanges, financial institutions, and broker/dealers. As a RITA Institute Instructor, Scott provides instruction on best practices on administering precious metals held in IRAs.

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