



## Patti Epstein

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**DEPUTY SECRETARY, WISCONSIN DEPARTMENT OF FINANCIAL INSTITUTIONS**

**FINTECH, CRYPTO, FIDUCIARY**

Patti Epstein has started and led large and small organizations and served on several boards. She currently serves as Deputy Secretary of the Wisconsin Department of Financial Institutions. She was appointed to this position by the Secretary after serving a 2-1/2 year appointment as Administrator for the Department of Corporate and Consumer Services. Her background includes extensive financial services company oversight, starting and running two family businesses, being a key board member of a tech firm, and understating crypto trends. She is certified in Six Sigma, Flexible Compensation, Cryptocurrency, as a Change Leader and in Health Insurance. Patti has extensive merger and acquisition experience and won an international award from Microsoft for excellence in emerging technologies.

Patti has served on corporate and non-profit boards for more than two decades. Current board service includes Gallant Knight Limousine Service, TEMPO-Madison, Wisconsin Remote Notary Council and three UW Health advisory councils. She co-launched a national 501(c)3 public charity with over 40 sponsors raising \$300,000. The organization enabled 10,000 nurses to be placed and serve on boards of for profit, not for profit and community boards to ensure strategic health initiatives.

In her current role, Patti oversees a staff of 143 in four regulatory and licensing divisions or offices, the Division of Administrative Services and Technology, and the Office of Financial Capability with program revenue of over \$98M. The agency regulates, licenses, or registers 149 state-chartered banks and saving institutions; 117 state-chartered credit unions; 21,938 licensed financial services providers; 22,014 charitable organizations; 515,670 business entities; 164,221 securities agents; 1,587 broker-dealers; and 345 investment advisers.

At TASC, the nation's largest third-party benefits administrator, with revenues over \$100 Million and 1,000 employees, Patti was Director of Administration. In this role, she spearheaded projects changing brands, processors, platforms and adding features for over 1 million healthcare debit cards. In addition, she led five acquired entities while orchestrating their integration. She was awarded the first President's Award of Distinction exemplifying operational excellence. Previously at JT Packard, the nation's largest independent service provider for network-critical power, the organization faced a class action suit for violation of federal and state Fair Labor Standards Act. Patti assumed the lead in developing a business restructuring of the organization to re-classify 150 field staff in under 9 months. She worked closely with the Chief Restructuring Officer to retain staff, maintain strong performance and maximize value during sale and transition to new ownership.

Patti grew the education business unit of Inacom Information Systems from 10 employees to over 30 employees in 3 offices across Wisconsin to position it to win Microsoft #1 Worldwide Learning Solution Partner out of 129 organizations. The Microsoft Partner Program Awards recognizes Microsoft Certified Partners that have demonstrated excellence in emerging technologies. She then went on as the key executive to shepherd a new CEO with a contrasting style from the former company leader, to maintain high retention of employees and clients. While at Wisconsin Physicians Service (WPS), a leading not-for-profit health insurer, she earned a national designation from the Health Insurance Associate (HIA).

Patti holds a B.S. in Business with a minor in Computer Science.