

Getting To Know Our Team

Drew Schaefer joined SCJ Fiduciary Services full-time in 2018 and had previously been engaged for his financial expertise since 2015, on an as-needed basis. Drew originally served as Director of Finance and Compliance before progressing to an Independent Trustee.

His career began at Ernst & Young (2005-2008) in Dayton, OH. Upon moving to Louisville, KY, he served in a financial reporting capacity with ResCare, Inc (2008-2010). Drew joined Mortenson Dental Partners, an ESOP, in 2010 and was appointed Controller from 2012 to 2016. Having served in an ESOP company gave him a passion for employee ownership, and a desire to spread the model of wealth sharing.

Drew graduated from the University of Dayton in 2005 with a Bachelor of Science in Accounting and a Master of Business Administration. He became a licensed certified public accountant (CPA) in 2007. Drew is a member in good standing of the National Center for Employee Ownership (NCEO) and the ESOP Association. Additionally, he serves as Treasurer for the Wiedemann-Steiner Syndrome Foundation Board.

In his free time, Drew enjoys spending time with his wife Kristin, and their four children. When he's not taking his kids to national parks, Drew can be found raising bees, driving his Volkswagen Thing, and cheering on his Dayton Flyers.



Drew Schaefer

Drew Schaefer – Background

EXPERIENCE



SCJ Fiduciary Services – Director of Compliance & Finance / ESOP Independent Trustee	2015-Present
Cardinal Point Financial – Controller	2016-2018
Mortenson Dental Partners – Controller	2010-2016
ResCare, Inc. – Financial Reporting Manager	2008-2010
Ernst & Young – Senior	2006-2008

EDUCATION



University of Dayton – Accounting / MBA	2001-2005
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VOLUNTEERING



Wiedemann-Steiner Syndrome Foundation – Board Member/Treasurer	2022-Present
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