



**Shawn West, AIF<sup>®</sup>, CPFA<sup>®</sup>, C(k)P<sup>®</sup>**  
*Founder, ERISA Director*  
**CuraFin Advisors**

With over two decades of ERISA plan management, fiduciary process, and legislative advocacy, Shawn is responsible for overseeing the firm's strategic direction, and is a member of the firm's Investment Advisory Board. He has considerable experience with ERISA plan mergers & acquisitions, public and private companies, from enterprise to small family businesses in all industries.

Shawn studied Psychology at Southern Illinois University, has obtained his series 6, 63, and 65 licenses, holds a Certified Plan Fiduciary Advisor (CPFA<sup>®</sup>) designation through the American Society of Pension Professionals & Actuaries (ASPPA), and Accredited Investment Fiduciary (AIF<sup>®</sup>) certification.

He is a member of the National Association of Plan Advisors (NAPA) and serves on their Governmental Affairs Committee for the past decade. Shawn is a founding ambassador for TGen (Translational Genomics Research Institute), a member of PCH50 (Phoenix Children's Hospital Foundation), and the Phoenix Business Journals' Leadership Trust.

Additionally, Shawn serves on the PIMCO DC and Voya Institutional Advisory Boards.



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## Annie Messer, AIF<sup>®</sup>, CPFA<sup>®</sup>, NQPA<sup>™</sup>, QKA<sup>®</sup>, RCC<sup>™</sup>

President, Member Relations, Pension Resource Institute  
Vice President, Fiduciary Services, Group Plan Systems

Annie Messer is the President, Member Relations of the Pension Resource Institute (PRI), a firm that delivers strategic consulting, compliance, training and technology-based solutions to financial institutions and plan fiduciaries serving retirement investors.

At Group Plan Systems (GPS), an independent Pooled Plan Provider for multiple Pooled Employer Plans, Annie focuses on development and maintenance of the GPS oversight process and fiduciary supervision. Annie joined PRI and GPS in March 2023.

Prior to joining PRI and GPS, Annie spent 14 years at Cambridge Investment Research, Inc., serving in a variety of roles, including planning, development and support of retirement plan technology solutions, fiduciary resources, regulatory and retirement education, and ERISA compliance.

Annie holds a B.A. degree from Western International University in Human Resources. She holds the Series 7, 24 and 66 FINRA licenses, Accredited Investment Fiduciary<sup>®</sup> (AIF<sup>®</sup>), Certified Plan Fiduciary Advisor<sup>®</sup> (CPFA<sup>®</sup>), Nonqualified Plan Advisor<sup>™</sup> (NQPA<sup>™</sup>), Qualified 401(k) Administrator (QKA), and Registered Corporate Coach<sup>™</sup> (RCC<sup>™</sup>) designations and has completed the Cannon Trust Fundamentals and Cannon Financial Professional Course on Trusts.