Jania Stout, CPFA
President, Retirement & Wellness
Prime Capital Financial

Jania Stout is a distinguished professional with nearly three decades of experience in ERISA plan consulting, currently serving as President of Prime Capital Retirement and Prime Capital Wellness. Jania brings her proven leadership and experience dedicated to supporting Plan Sponsors and their employees. Building on the company's strong foundation of delivering innovative retirement and wellness solutions, Jania is committed to enhancing the firm's impact by driving initiatives that empower organizations and their workforces. Her focus is on advancing comprehensive strategies that blend retirement planning, employee wellness, and financial education to give Prime Capital the ability to lead the industry in helping clients achieve long-term success.

Jania previously held the position of Senior Vice President at OneDigital Retirement & Wealth, where she and her team advised on retirement plans encompassing more than $12 billion in assets and serving over 250,000 employees. Her achievements include being honored as the 2016 Plan Adviser of the Year by Plan Sponsor Magazine and her role as the Past President of the National Association of Plan Advisors (NAPA). She was recently (2023) named Retirement Plan Advisor of the Year by Institutional Investors. She has a true passion for helping the employees of the clients she serves find a way toward financial independence. Evidence of this passion was found when she was named Top Advisor by Participant Outcomes (TAPO of the Year) by 401(k) Specialist Magazine in 2021.

Jania's influence extends beyond her impressive career. She has dedicated over a decade to being a voice for Plan Sponsors nationwide with her work on Capitol Hill. She was invited to share her insights as a Retirement Expert during Congressional testimony (Ways and Means Committee) in the summer of 2017. In addition, her experience was sought by the Department of Labor (DOL) in the Spring of 2016 to contribute her perspective on the then-pending Fiduciary Regulation. Jania, a renowned national speaker, frequently addresses audiences on Financial Wellness, Employee Engagement, and Fiduciary Governance Best Practices. Her experience has garnered attention from prestigious publications such as the Washington Post, Investment News, Benefits Magazine, RIA Biz, and Plan Sponsor Magazine.

Robert Massa, ChFC®, CEBS®, AIF®, CPFA®, NQPC®
Managing Director of Retirement
Prime Capital Financial

Robert Massa is the Managing Director of Retirement in Houston, TX for Prime Capital Retirement (PCR). Rob is a retirement professional with more than 30 years of retirement industry experience. His primary responsibilities include practice management, investment advice, retirement plan design consulting and compliance, employee education advice and development, financial wellness strategies, client relationship management and SEC compliance. His career has been focused in the investment management and administration of qualified retirement plans in a diverse series of roles including investment advice, trust administration, recordkeeping, plan document drafting, compliance testing, product management, plan corrections and client consultation.

Rob has a Bachelor of Arts in public administration and a minor in mathematics from the College of New Jersey. He is a licensed life/health representative, has passed the Series 65 securities exam, is a Chartered Financial Consultant (ChFC), a Certified Employee Benefits Specialist (CEBS), an Accredited Investment Fiduciary (AIF), Certified Plan Fiduciary Advisor (CPFA). And a Certified Health Savings Advisor (CHSA). Rob taught employee benefits at St. Thomas University for the Certified Financial Planner© program. He has also been interviewed for various articles in U.S. News and World Report, The Motley Fool, Houston Business Journal, Institutional Investor, the Fiduciary News, TheStreet.com and CFO magazine and is a regular speaker at regional and national retirement and benefits conferences. In 2016, Rob was named Retirement Adviser of the Year by Employee Benefit Adviser magazine. In 2023, Rob was named Adviser of the Year by PlanSponsor Magazine in the category of Plan Sponsor Service.

Your Senior Retirement Plan Director

Andrew A. Brosco

Senior Retirement Plan Director
South Central

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Background

Andrew Brosco began his career in the financial services industry as an inbound services representative at Putnam Investments and was quickly promoted to an internal wholesaler. He transitioned into an internal wholesaler role at Amundi where he achieved several milestone accomplishments including receiving an award for internal wholesaler of the quarter, serving as a board member for the internal sales force council and was a two-time finalist in Amundi's bi-annual "Top Gun" presentation contest. Andrew was promoted to an external role and built strong partnerships with the financial advisors and consultants in his territory. He later joined John Hancock Investment Management representing the same territory. In 2020 and 2024, he was selected for the NAPA Top DC Wholesaler - "Advisor Allies" award, which recognizes the nation's top 100 DC wholesalers. Most recently, he joined Franklin Templeton and is thrilled by the expanded opportunity set that he is able to offer to his partners.

As a Senior Retirement Plan Director, US Retirement for Franklin Templeton, Andrew partners with the top retirement plan consultants and plan advisors in the United States with a focus on developing a trusted relationship where he can bring investment solutions and practice management consulting experience. His collective goal with his partners is to help participants improve retirement outcomes. He has become well known for his personalized approach and commitment to supporting the advisors and consultants with whom he collaborates.

Credentials and awards

Andrew graduated with Cum Laude honors from Boston University's School of Management, receiving a Bachelor of Science in business administration, with a dual concentration in finance and organizational behavior. He holds FINRA Series 7 and 63 licenses

Personal

Outside of his professional life, he cherishes moments spent in Austin, TX, where he unwinds and makes memories with his wife, two sons, family and friends.