TPSU
THE PLAN SPONSOR UNIVERSITY

Michael Del Re III, AIF®, ChFC®, REBC®, CPFA®
Managing Partner, Northeast Regional Leader
Prime Capital Financial of Connecticut

As Managing Partner of Prime Capital Financial of Connecticut, I've spent over 30 years building long-term relationships and guiding clients through the complexities of employer-sponsored retirement plans.

My approach begins with transparency, backed by technical proficiency, and anchored in a deep commitment to helping people retire with dignity. I believe trust isn't something you wait to earn—it's something you build by doing the right thing from the very beginning.

Many of my client partnerships have spanned decades, and I take great pride in the loyalty and confidence they've placed in me throughout the years.

Beyond retirement plan consulting, I work closely with individuals and families—many of whom I've had the privilege of advising for years, and in some cases, across multiple generations. I believe financial planning should be personal, and I strive to deliver tailored solutions backed by the resources of a robust and experienced team.

With a bachelor's degree in finance from Bentley University and the Accredited Investment Fiduciary® (AIF®) designation from the University of Pittsburgh's Katz School of Business, I bring both academic and practical experience to every engagement. I also hold FINRA Series 6, 63, and 65 securities registrations, as well as life and health insurance licenses. I'm continually working to expand my knowledge through ongoing education for the Chartered Financial Consultant® (ChFC®), Registered Employee Benefits Consultant® (REBC®), and Certified Plan Fiduciary Advisor (CPFA®) designations.

Outside of work, I'm a proud father of two adult children in their twenties. I'm a lifelong sports fan, love to cook, and enjoy time on the golf course or just relaxing with family and friends. Relationships are at the heart of everything I do—personally and professionally.

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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.

Biography

Sue Walton

Sue Walton is a senior retirement strategist at Capital Group, home of American Funds. She has 27 years of industry experience and has been with Capital Group for nine years. Prior to joining Capital, Sue was a director at Towers Watson Investment Services. Before that, she was an investment consultant at Mercer Investment Consulting and Ellwood Associates. She holds an MBA from DePaul University with a concentration in finance and a bachelor's degree in business administration, economics and international business from Marquette University. Sue is based in Chicago.