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.

Advisory products and services offered by Investment Adviser Representatives through Prime Capital Investment Advisors, LLC ("PCIA"), a federally registered investment adviser. PCIA: 6201 College Blvd., Suite#150, Overland Park, KS 66211. PCIA doing business as Prime Capital Financial | Wealth | Retirement | Wellness.

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.