



CONFERENCE

APRIL
25-27

20 X 18

SAN DIEGO
CALIFORNIA

HILTON SAN DIEGO BAYFRONT

Jason Roberts

Founder / Chief Executive Officer
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Jason C. Roberts, Esq. is the founder and CEO of the Pension Resource Institute (PRI), a consulting firm that delivers compliance, training and technology-based solutions to financial institutions serving retirement investors. He is also the managing partner of Retirement Law Group (RLG), a law firm focusing on ERISA, tax and investment-related matters.

Prior to founding PRI and RLG, Jason was a partner and co-chair of the Financial Services Group at a leading ERISA law firm and the head of the Investment Fiduciary practice for a national securities law firm.

Jason has been repeatedly recognized as one of the “100 Most Influential in Defined Contribution” by 401(k) Wire and a “Rising Star” by SuperLawyers Magazine. In 2015, he was selected by InvestmentNews as one of the Top 40 Advisors & Associated Professionals under 40, and the Wall Street Journal tapped Jason to participate in its Ask the Experts series on the Department of Labor’s Fiduciary Rule.

Jason received his BSBA in Finance & Banking from the Univ. of Missouri and his J.D. from UCLA Law School.