JASON C. ROBERTS, ESQ., AIFA®

Chief Executive Officer
Pension Resource Institute, LLC

jroberts@pension-resources.com

Jason is the Founder and CEO of the Pension Resource Institute (PRI) providing strategic consulting, education and technology-based solutions for retirement plan service providers and plan sponsors.

Prior to founding PRI, Jason was a partner and co-chair of the Financial Services Group at a leading ERISA law firm, where his practice focused on employee benefits and securities regulation. He continues to provide legal counsel on ERISA- and investment-related matters through the law firm of Roberts Elliott, LLP.

Jason was recently named as one of the "100 Most Influential in Defined Contribution" by the 401(k) Wire and a "Rising Star" by SuperLawyers Magazine. He received his B.S.B.A. in Finance & Banking from the University of Missouri and his J.D. from the University of California, Los Angeles (UCLA) School of Law.

Thornburg Investment Management®

Strategies for Building Real Wealth

Jonathan R. Blaze, AIFA®
Regional Retirement Consultant

BS, Bradley University

Jonathan Blaze is a regional retirement consultant for the Central Region at Thornburg Investment Management. He is responsible for investment-only corporate retirement plan business development and marketing of the company's value-added services to service provider platforms and advisors. As part of the expanding retirement group at Thornburg, Jonathan is primarily responsible for business in the Central Region of the United States.

Jonathan has extensive experience and knowledge having worked for more than 27 years in both the investment industry and retirement plan marketplace. Prior to joining Thornburg, Jonathan was a pension consultant with Great-West Retirement Services/ FASCORP, senior vice president UBS /Global Asset Management, vice president broker relations retirement services Scudder Kemper Investments, vice president institutional marketing Calamos Asset Management, and vice president regional director Diversified Investment Advisors.

Jonathan received his BS in business public relations/marketing from Bradley University, Peoria, IL. He holds the Accredited Investment Fiduciary Analyst™ (AIFA) designation from The Center for Fiduciary Studies and is currently registered with FINRA with a Series 6, 7, 63, and 65.

Thornburg Investment Management, Inc.®
2300 North Ridgetop Road
Santa Fe, New Mexico 87506
800.847.0200
www.thornburg.com