

Matt Sommer



Matt Sommer is Director and Senior Retirement Consultant at Janus. In this role, he provides advice and consultation to Financial Advisors surrounding some of today's most complex retirement issues. His expertise covers a number of areas including regulatory and legislative trends, practitioner best practices, and financial and retirement planning strategies for HNW clients.

Prior to joining Janus, Matt spent 17 years at Morgan Stanley Smith Barney and its predecessors. Matt held a number of senior management positions including Director of Financial Planning at Citi Global Wealth Management and Director of Retirement Planning at Smith Barney.

Matt received his undergraduate degree in Finance from the University of Rhode Island and received a Masters of Business Administration with a specialization in Finance from the Lubin School of Business at Pace University.

Dr. Gregory Kasten



Dr. Gregory Kasten serves as Founder and CEO of Unified Trust Company. Following graduation from Southern Illinois School of Medicine in 1980, he completed an internal medicine internship and anesthesiology residency at the University of Kentucky Medical Center and is a board certified anesthesiologist. He received a master of business administration degree from the University of Kentucky College of Business. Dr. Kasten was awarded the Accredited Investment Fiduciary Analyst™, the Certified Financial Planner™ and the Certified Pension Consultant designations.

He has published more than seventy-five papers on financial planning and investments; wrote the book Retirement Success; and he co-authored the first place winning paper: "Post Modern Portfolio Theory" which he presented at the Financial Planning Association national meeting. Medical Economics listed Dr. Kasten as one of "The 150 Best Financial Advisers for Doctors" in the country. In 2011 Dr. Kasten was inducted into the Advisor Hall of Fame by Research Magazine.