

Retirement Plan Executive Joins PRI and GPS

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San Diego, CA – The Pension Resource Institute, LLC (PRI), a retirement plan compliance, technology, and consulting firm, has added Annie Messer as President, Member Relations, effective March 13, 2023.

“We are excited to bring someone of Annie’s caliber into our firm,” said Jason C. Roberts, CEO of PRI. “Annie brings a deep technical understanding of retirement plans and experience helping financial institutions and professionals grow and scale their practices.” As the head of Member Relations, Annie will focus her efforts on enhancing the PRI member experience. “We are looking forward to working with Annie to drive new insights and expand the ways in which we serve our members,” Roberts adds.

“I am honored to have the opportunity to join a team with such highly respected expertise in retirement plans,” Ms. Messer said. “I hope to employ my prior experience working with retirement plan advisors to benefit PRI members.”

Ms. Messer will also serve in a client-facing role at Group Plan Systems (GPS), a joint venture owned equally by PRI and Waypoint Fiduciary, LLC. GPS is an independent, operational fiduciary serving as Pooled Plan Provider over pooled employer plans (PEPs). “When I think of group retirement plans, I think of Pete Swisher (Founder of Waypoint Fiduciary, LLC). The combination of ERISA expertise and technical knowledge PRI and Waypoint bring to this program is exceptional; I’m delighted to be part of it,” Ms. Messer said.

Annie brings more than 14 years of experience to PRI and GPS, serving in a variety of roles at Cambridge Investment Research, including planning, development and support of Cambridge’s retirement plan technology solutions, fiduciary resources, regulatory and retirement education, and ERISA compliance.

About PRI: PRI delivers a customizable and comprehensive suite of compliance forms, agreements, disclosure, policies and procedures, and training materials specifically designed to help banks, broker-dealers, and investment advisers simplify regulatory complexity, while providing competitive services to retirement investors. From account opening to supervision, PRI’s Compliance Portal and Member Dashboard allow firms to configure their services to align with the proficiency of their advisors or segments thereof. PRI staff is available to deliver unlimited consulting support throughout the process and maintains all resources to keep current with changing laws, regulations, and industry best practices. Advisors can access their member firm’s version of PRI’s *Advisor Resource Center* where they can get account opening and practice management resources unique to their firm. Our subscription-based model delivers cost certainty in times of increasing legislative and regulatory uncertainty.



For more information, please email us at info@pension-resources.com.

About GPS: Group Plan Systems, LLC (GPS) is an independent fiduciary and consultant specializing in group retirement programs. GPS serves as a pooled plan provider, named fiduciary, and plan administrator under ERISA Sections 3(44), 402(a), and 3(16), meaning we stand in the shoes of a retirement plan sponsor and execute their duties as a professional operational fiduciary. We are also available to help financial professionals looking to learn more about developing and operating group plan programs.

For more information about GPS, please contact us at info@groupplansystems.com.