



FOR IMMEDIATE RELEASE

Manager Michelle Cannan Earns CPFA Certification

Rochester, NY, March 1, 2018 - Beltz Ianni & Associates, LLC announced today that retirement services manager, Michelle Cannan, has attained the Certified Plan Fiduciary Advisor (CPFA) credential from the National Association of Plan Advisors (NAPA). Plan advisors who earn their CPFA demonstrate the expertise required to act as a plan fiduciary or help plan fiduciaries manage their roles and responsibilities.

Michelle, as a member of Beltz Ianni & Associates' Retirement Plan Consulting Team, delivers plan design consulting, administration, and compliance services to our valued clients. Michelle has over 12 years of experience in the pension field performing plan benchmarking, investment, and fiduciary reviews. She routinely guides clients through annual compliance requirements and plan audits.

Before joining Beltz Ianni, Michelle was a client manager with The Kraematon Group, Inc., a retirement plan advisor located in Wellesley, MA. Prior to Kraematon, she was a relationship manager with Paychex, Inc.'s Retirement Services Department, and she held several leadership positions with a multinational banking and financial services corporation.

About Beltz Ianni & Associates, LLC

Located in and serving the Rochester, New York community since 2001, Beltz Ianni & Associates, LLC is a comprehensive financial services firm, focused on helping people prepare for and maintain a successful retirement. In addition to managing the fiduciary concerns of employers through their retirement plan business services, Beltz Ianni & Associates provides retirement, insurance, and investment planning for individual clients. More information about Beltz Ianni & Associates can be found at www.beltz-ianni.com or info@beltz-ianni.com.

About National Association of Plan Advisors

The National Association of Plan Advisors, an affiliate organization of the American Retirement Association, is a professional society uniquely committed to seven core principles of advisors serving employer-sponsored retirement plans: (1) The retirement industry is in transition and NAPA is a leader for positive change; (2) NAPA's core purpose is to enhance retirement security in America; (3) NAPA members focus on providing high quality, professional advice to retirement plans and/or their participants; (4) NAPA members are committed to leading the transition to a more transparent, effective, professionally governed retirement system; (5) NAPA members may serve as either fiduciaries or non-fiduciaries, but are committed to clearly disclosing their fiduciary or non-fiduciary status to their ERISA retirement plan clients; (6) NAPA members pledge to comply with all requirements relating to retirement plans that are or will be required by the SEC, DOL, or any other governing agencies; and (7) NAPA members pledge to maintain ethical standards in their representation of plan sponsor and participant clients and will strive to service them under a process that puts their clients' interests first. More information on NAPA can be found at www.napa-net.org/about-us.

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