



FOR IMMEDIATE RELEASE

Partner Bob Judd Earns CPFA Certification

Rochester, NY, May 11, 2016 - Beltz Ianni & Associates, LLC announced today that partner Bob Judd 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.

Bob Judd, CEBS, CPFA has worked in the retirement plan services industry for over 25 years. He is focused on helping retirement plan sponsors understand and mitigate their fiduciary risks and achieve a high degree of confidence in the operation of their company plan. Judd is responsible for the operational and strategic direction of Beltz Ianni & Associates, LLC. He shares responsibility for the oversight and development of the Business Services Group with Fred Beltz.

Before joining Beltz Ianni & Associates Judd was the President of EPIC Advisors, Inc. In his role at EPIC he was responsible for oversight of \$5 billion in assets under administration, over 1,300 retirement plans, and over 100,000 participants. Before EPIC, Bob provided consulting services to banks across the United States with regard to their retirement plan services and product offering. He also worked for M&T Bank and was in charge of their 401(k) product.

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 planning 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.