

ROB MASSA, ChFC, CEBS, CFPA, AIF, CBC

DIRECTOR, RETIREMENT



Robert Massa is the Director of Retirement for Ascende and the President of Ascende Wealth Advisers, Inc. (AWAI), both wholly owned subsidiaries of EPIC. Rob is a retirement professional with more than twenty five years of retirement industry experience. His primary responsibilities with Ascende and AWAI include practice management, SEC compliance, strategic investment direction, retirement consulting standards and practices, employee education and development, financial wellness strategies and oversight of client relationships and engagements. His career has been focused in the investment management and administration of qualified retirement plans in a diverse series of roles including investment advice, trust administration, recordkeeping, compliance testing, product management, legal, FINRA securities compliance and client consultation.

Prior to joining Ascende, Mr. Massa spent 10 years as a vice president and principal at MBM Advisors, Inc. where he was also a shareholder of the company.

Mr. Massa has a Bachelor of Arts in public administration and a minor in mathematics from the College of New Jersey. He is a licensed life/health representative, has passed the Series 7, 24, 63 and 65 securities exams, is a Chartered Financial Consultant (ChFC), a Certified Employee Benefits Specialist (CEBS), an Accredited Investment Fiduciary (AIF) and Cash Balance Consultant (CBC). Rob taught employee benefits at St. Thomas University for the Certified Financial Planner® program. He has also been interviewed for various articles in U.S. News and World Report, The Motley Fool, Houston Business Journal, Institutional Investor, the Fiduciary News, TheStreet.com and CFO magazine and spoken at several regional and national conferences, including the PlanSponsor national conference and the International Society of Certified Employee Benefit Specialists annual conference. In 2016, Mr. Massa was named Retirement Adviser of the Year by Employee Benefit Adviser magazine.

Industry experience: Over 25 years.

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