

Jason Roberts

Jason is the founder and CEO of Pension Resource Institute, LLC (PRI) – a firm that helps banks, broker-dealers and investment advisers with compliance, training and practice management relating to serving retirement investors. He is also the founder and managing partner of Retirement Law Group (RLG), a law firm serving plan sponsors, investment professionals and service providers in all aspects of retirement-related products and services.

Prior to founding PRI and RLG, Jason was a partner and co-chair of the Financial Services Group at a leading ERISA law firm and the head of the Investment Fiduciary practice for a national securities law firm.

Jason has published numerous articles focusing on ERISA and securities compliance, fiduciary best practices and is a frequent speaker at retirement plan and financial industry conferences. He is a contributing author and faculty member for the Practicing Law Institute. Jason has been repeatedly recognized as one of the “100 Most Influential in Defined Contribution” by the 401(k) Wire and a “Rising Star” by SuperLawyers Magazine and was selected by InvestmentNews as one of the Top 40 Advisors and Associated Professionals under 40. The Wall Street Journal has also tapped Jason for its Ask the Experts series answering readers’ questions relating to the DOL Fiduciary Regulation.

Jason received his B.S.B.A in Finance & Banking from the University of Missouri and his J.D. from UCLA Law School.

Outside of work, you can find Jason deep sea fishing, tending a wide range fresh citrus in his grove, cooking, and spending time with his wife, Val, and daughter, Lola.