

EPIC Consultants Rob Massa and Craig Schmidt Honored as Employee Benefit Advisers of the Year

SAN FRANCISCO, Calif. and HOUSTON, Texas, Sept. 1, 2016 (SEND2PRESS NEWSWIRE) – EPIC Insurance Brokers and Consultants, a retail property, casualty insurance brokerage and employee benefits consultant, announced today that Employee Benefit Adviser (EBA) has named Director of Retirement Rob Massa the “Retirement Advisor of the Year” and Senior Wellness Consultant Craig Schmidt the “Wellness Advisor of the Year” in the publication’s 2016 Employee Benefit Advisers of the Year Awards. After a month-long national nomination process conducted by EBA’s editorial team, Massa and Schmidt secured two of the five 2016 Employee Benefit Advisers of the Year Awards.



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Employee Benefit Adviser’s 2016 Advisers of the Year recognizes outstanding service to group benefit plan sponsors by their brokers or advisers. According to EBA, being an outstanding broker/consultant means more than simply meeting client expectations about products and services, but also identifying factors that determine their true value to clients as trusted advisers. The winners of this award have demonstrated a consistent pattern of forward-thinking innovation and achievement in the employee benefits industry.

“We are proud that these extraordinary EPIC professionals have been

recognized among EBA's 2016 Employee Benefits Advisers of the Year," said John Hahn, CEO of EPIC. "To have two of our consultants among this small, elite group nationally is a significant accomplishment and honor, which validates the outstanding service and value that both Rob and Craig consistently deliver to our EPIC clients."

Rob Massa is a 25-year industry veteran who created EPIC's investment advisory firm five years ago, which has since grown to exceed \$3 billion in assets under management. As an industry thought leader, CPAs and attorneys often call Massa for his take on everything from plan design to fiduciary issues.

Craig Schmidt is among the EPIC Wellness Consultants who deliver a wealth of customized resources to clients across the country. He managed the rebranding of EPIC's wellness communication and created the wellness playbook, while turning wellness from a reactive process for employers into an integrated part of their overall benefit programs and strategies.

See the entire list of 2016 Advisers of the Year here:

<http://www.employeebenefitadviser.com/slideshow/who-are-ebas-2016-advisers-of-the-year>

About Rob Massa, Director of Retirement, Ascende – an EPIC Company:

Rob Massa joined Ascende as the retirement practice leader in 2010, and in 2011, led the introduction of Ascende Wealth Advisers, Inc. He oversees a team of retirement professionals who work with clients and investment committees to help them develop meaningful retirement plan strategies, manage compliance requirements and fiduciary duties, educate employees and make informed decisions in plan operations.



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Prior to joining Ascende, he spent 10 years at MBM Advisors, Inc. as a vice president, principal and shareholder of the company. His entire career has been focused in the investment management and administration of qualified retirement plans through a diverse series of responsibilities, including investment advice, trust administration, recordkeeping, compliance testing, product management, legal, Financial Industry Regulatory Authority (FINRA) securities compliance and client consultation.

Rob has a Bachelor of Arts degree 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 a Cash Balance Consultant (CBC). In addition, he taught employee benefits at St. Thomas University for the Certified Financial Planner® Program.

About Craig Schmidt, Senior Wellness Consultant, EPIC:

As a Wellness Consultant, Craig works with a team of other like-minded wellness professionals to create a healthier working environment for the members and clients EPIC serves. He has a strong background in Health Education, Health Promotion and in particular a passion for work-site impacts health and wellness plays at any company. Craig strives to not only help our client members that have partnered with EPIC but he also works to be an example in his own daily life, with his co-workers and regular interactions with people.



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Prior to joining the EPIC team, Craig worked in many roles within the worksite wellness field to help strengthen him for the position he currently holds. He has been a health coach working with individuals 1-on-1, a Program Coordinator for a wellness service provider, and a Health Educator within a carrier disease management platform. Most recently, Craig took on an integral role in an innovative approach to combine workplace initiatives in wellness with carrier services to improve health care consumerism as a Wellness Liaison with WellPoint Inc. Craig was positioned on-site at Google Inc. to work directly with their Human Resources department and with their employees having daily in person interactions whenever needed.

Craig's endeavor in his own health and wellness help strengthen his passion to be a leader in the field of wellness and health management and become a valued asset at EPIC as we continue to grow our presence as a worksite wellness innovator. Craig earned his Bachelors of Science in Health Education and Promotion with an emphasis on Worksite Studies at East Carolina University in Greenville, North Carolina. He then continued his studies at the University of Colorado, Denver Anschutz Medical Campus where he completed his Certificate of Public Health Sciences.

About EPIC:

EPIC is a unique and innovative retail property and casualty and employee benefits insurance brokerage and consulting firm. EPIC has created a values-based, client-focused culture that attracts and retains top talent, fosters employee satisfaction and loyalty and sustains a high level of customer service excellence. EPIC team members have consistently recognized their company as a "Best Place to Work" in multiple regions and as a "Best Place to

Work in the Insurance Industry” nationally.

EPIC now has more than 850 team members operating from offices across the U.S., providing Property Casualty, Employee Benefits, Specialty Programs and Private Client solutions to more than 13,000 clients.

With more than \$200 million in revenues, EPIC ranks among the top 20 retail insurance brokers in the United States. Backed by the Carlyle Group, the company continues to expand organically and through strategic acquisitions across the country.

For additional information, please visit <http://www.epicbrokers.com/>.

PHOTOS FOR MEDIA:

- (1) Send2Press.com/wire/images/16-0901-schmidt-300dpi.jpg
- (2) Send2Press.com/wire/images/16-0901-massa-300dpi.jpg

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