



Pentegra Welcomes Carlo Guerrero as Director, National Accounts

White Plains, NY, March 23, 2023 Today, Pentegra, a leading provider of retirement plan and fiduciary outsourcing solutions, announced the addition of Carlo Guerrero as Director, National Accounts, to its growing team.

As Director, National Accounts, Guerrero will focus on developing Pentegra's strategic level enterprise and advisory relationships. He will report to Pentegra Executive Vice President, Matthew P. Mintzer.

A relationship-focused retirement industry professional with deep expertise in business development, Guerrero joins Pentegra with an impressive track record of professional success and more than 20 years of expertise in building strategic relationships with retirement industry partners.

Most recently, he served as Head of Institutional Sales at Future Plan/Ascensus, where he led a team responsible for identifying, managing, and expanding relationships and strategic alliances with recordkeeping, asset management, payroll and retirement advisory firms. He spent the majority of his career at MassMutual, where he held numerous positions, most recently as Head of Workplace Strategic Relationships, overseeing MassMutual's relationships across key distribution channels.

Said Mintzer, "We are excited to have Carlo join the team. Anyone who knows Carlo knows the trust he has earned with so many professionals in our industry. He joins us at a time when we are building scalable independent fiduciary partnerships with the industry's leading distribution and recordkeeping organizations. He will be instrumental in facilitating growing relationships with our enterprise partners and in developing opportunities for new partnerships as we continue to expand our 3(16) fiduciary footprint across the industry."

Said Guerrero, "I couldn't be more excited to join the Pentegra organization and the opportunity to expand partnerships, distribution opportunities and Pentegra's 3(16) fiduciary presence, especially as we move into the large plan market. I look forward to working with Matt and the team to build on our success."

Guerrera holds a Masters of Business Administration (MBA) and Bachelor of Science (BS) in Business Administration from the University of Hartford along with FINRA Series 6 & 26 licenses.

About Pentegra

Pentegra is a leading provider of retirement plan and fiduciary outsourcing solutions to organizations nationwide. As one of America's oldest independent fiduciaries, we deliver retirement plans that run with less risk, greater efficiencies and improved outcomes. With an 80-year legacy of fiduciary expertise and oversight unmatched in the industry today, we partner

with firms at the advisor, sponsor or enterprise level to bring maximum flexibility to every opportunity, offering a comprehensive array of retirement plan solutions, consulting, TPA services and fiduciary support. Learn more at pentegra.com.

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