



## FOR IMMEDIATE RELEASE

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### PASI Joins U.S. Retirement & Benefits Partners

Iselin, NJ, September 8, 2023 – U.S. Retirement & Benefits Partners (USRBP) announced today the acquisition of PASI (Pension Administrative Services Inc.), based in Farmington, CT.

For almost 30 years, PASI, one of New England’s largest private retirement plan consulting and third-party administration firms, has been providing successful solutions to small and mid-size businesses throughout the Northeast. PASI Principals David Wetsman, J.D., and Ron Fishman, QKA, will assume the roles of Managing Partner and will continue to lead the business along with the other key Principals and staff.

Wetsman and Fishman stated, “We believe that the collaboration with the USRBP team, along with their extensive resources, shared values and vision will allow us to expand our hands-on service model to our clients.” They further added that “the partnership will provide opportunities for our team to deepen the interaction with advisors, recordkeepers and other referral sources. This is an exciting step forward for our continued growth and success.”

Patrick Hale, Managing Partner of The Retirement Plan Company (TRPC), a USRBP Partner Firm, said, “The addition of PASI is a terrific strategic fit for USRBP to further expand our retirement plan TPA services into the Northeast.”

“We’re excited to welcome the PASI team to USRBP. This partnership gives us the opportunity to establish a USRBP footprint in the New England area, while supporting the terrific momentum that PASI has. We look forward to growing together,” said Megan Schneider, USRBP CEO.

#### About U.S. Retirement & Benefits Partners

U.S. Retirement & Benefits Partners, with headquarters in Iselin, NJ, is one of the nation’s largest independent, national financial services firms specializing in employee benefit and employer-sponsored retirement plans in the K-12 public school, governmental, corporate, and non-profit markets. Through partnering with 55 regional firms throughout the U.S., USRBP serves over 15,000 employer groups with 3.5 million participants. For more information, visit [www.usrbpartners.com](http://www.usrbpartners.com).



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*About Wise Rhino*

PASI, LLC was advised in this transaction by Wise Rhino Group, which provides M&A Advisory Services for Retirement & Wealth Advisory, TPA and Financial Services Industry Technology Firms. They are committed to being a unique resource and catalyst for Firms in pursuit of accelerated growth and sustained competitive success. Their team brings over one hundred years of cumulative experience in every aspect of the Wealth and Retirement verticals as Firms consider how to move forward with the most impactful alignment of partners, staff, and clients.

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