



William J Rogers Jr APA AIF

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William J. (Bill) Rogers, Jr. is a Retirement Plan Consultant for CPI Qualified Plan Consultants. He has been in the retirement plans business for twelve years. Among his designations, Bill is an Accredited Pension Administrator (APA) with the National



Institute of Pension Administrators (NIPA). Bill also holds the designation of Accredited Investment Fiduciary (AIF®) with fI360 and the National Institute for Fiduciary Studies. Bill graduated from Hartwick College in Oneonta, NY with a degree in Political Science. Bill previously served as a Senior Sales Support Consultant with Great-West Retirement Services in which he gained a great deal of experience in the administration and sales of 401(k) and defined contribution retirement plans. Among his responsibilities, Bill was a lead underwriter for micro and mid-size 401(k) plans, the lead plan

designer for sold bundled plans, and was involved in product development and broker support on the internal sales desk. Upon moving to Missouri in 2005, Bill served as a broker for retirement plans with a local financial firm and a manager of a small Third Party Administration firm. Prior to becoming the Regional Plan Consultant for the state of Missouri for CPI, Bill served as a Regional Manager and Compliance Specialist for a national TPA firm servicing school districts. Bill lives in Jefferson City, MO with his wife and two sons.