

Meet Your BPAS Team

At BPAS, we deliver a unique, vertically integrated solution where BPAS is the recordkeeper, third-party administrator, clearing firm, and asset custodian — simplicity and accountability, with a single point of contact. Our commitment to providing the absolute best in workplace retirement plans means you'll have direct access to experienced professionals who simplify the process, actually answer the phone, and focus on your success. Get to know your BPAS team. We're here to help make your life easier.



NAPA Advisors placed BPAS in the
Top 5 Recordkeepers covering 18 categories
across all markets, micro to mega!

Workplace Retirement Plans



Elizabeth Kaido
Senior Vice President,
Sales & Relationship Management
315.292.6939
EKaido@bpas.com



Brad Bonno
Vice President, Large Plan &
Strategic Solutions
412.593.1023
BBonno@bpas.com



Jason Disco
Senior Vice President, Sales
Actuarial & Pension
315.703.8916
JDisco@bpas.com



Victor Kwitkiwski
Vice President, Sales
Workplace Retirement Plans
603.718.2707
VKwitkiwski@bpas.com



Brian Nicholson
Vice President,
Relationship Management
315.292.6908
BNicholson@bpas.com



Joe Boyle
Regional Sales Director
Mid-Atlantic
267.948.1615
JBoyle@bpas.com



Chrissy DeCaria
Senior Relationship Manager
412.593.1018
CDeCaria@bpas.com



Dennis Duarte
Regional Sales Director
West Coast
315.292.6997
DDuarte@bpas.com



Sherry Haase
Relationship Manager
680.243.8172
SHaase@bpas.com



Mike Hahn
Regional Sales Director &
Relationship Manager
312.438.0252
MHahn@bpas.com



Tess Johnson
Relationship Manager
315.292.6999
TJohnson@bpas.com



Donna Kramer
Regional Sales Director
NY, FL, GA, TN, & Specialty
914.259.0236
DKramer@bpas.com



Joe Long
Regional Sales Director
South Central
214.218.8559
JLong@bpas.com



Susie Mansker
Regional Sales Director
Midwest
317.314.0665
SMansker@bpas.com



Dan Nolan
Relationship Manager
315.717.8557
DNolan@bpas.com



Chris Noyes
Regional Sales Director
New England
603.718.4712
CNoyes@bpas.com



Robert Perri
Regional Sales Director
Actuarial & Pension
315.360.0878
RPerri@bpas.com



Lori Harvey
Communication &
Project Specialist
315.292.6975
LHarvey@bpas.com



Lisa Mendez
Sales Support Assistant
212.284.9028
LMendez@bpas.com



Condra Stephens
Project Specialist &
Assistant to CEO
315.292.6994
CStephens@bpas.com



Rhyma Szymczyk
Inside Sales Consultant
713.744.3814
RSzymczyk@bpas.com



Fiduciary Services



Dan Roderigues
Vice President
267.948.1607
DRoderigues@bpas.com



Thomas Sutton
Sr. Trust Officer
267.948.1619
TSutton@bpas.com



Gregg Zimmerman
Sr. Vice President, Investments
713.744.3801
GZimmerman@bpas.com

Health & Welfare



Britt Wegener
Vice President,
Director of Sales
315.292.6947
BWegener@bpas.com



Renee House
Vice President,
Operations & Administration
315.292.2166
RHouse@bpas.com



Krystal Kirlis-Brochu
Director, Relationship Management
& National Accounts
603.722.4232
KBrochu@bpas.com



Caroline Becker
Partner Success Manager
713.744.3807
CBecker@bpas.com



Justin Kemmerlin
Manager, VEBA & CDHP
713.744.3804
JKemmerlin@bpas.com



Bianca Mendez
Partner Success Manager
713.744.3840
BMendez@bpas.com



Hannie Spitzack
CDHP Partner Success Manager
713.744.3844
HSpitzack@bpas.com



Deb Usborne
Partner Success Manager
713.939.4050
DU Osborne@bpas.com

IRA Services



Brian Douglas
Vice President
603.785.5677
BDouglas@bpas.com



Jill Kwitkiwski
Supervisor, IRA & Special Services
315.292.6965
JKwitkiwski@bpas.com

BPAS Trust Company of Puerto Rico



Alfredo Matheu
President
787.910.3466
AMatheu@bpas.com



Steven Graciani-Velazquez
Partner Success Mgr.
787.936.2259
SGraciani@bpas.com



Maribel Solá
Sr. Partner Success Mgr.
787.910.2927
MSola@bpas.com



Not sure who to call? We're here to help.

866.401.5272 | TrustSales@bpas.com | bpas.com



SERVICES: Workplace Retirement Plans | Actuarial & Pension | Health Benefit Consulting | IRA | VEBA HRA | Health & Welfare Plans
Fiduciary | Collective Investment Funds | Fund Administration | Institutional Trust

SUBSIDIARIES: BPAS Trust Company of Puerto Rico | Global Trust Company | Hand Benefits & Trust | NRS Trust Product Administration

REV: 04.15.24