Commonwealth's Strategic Retirement Solutions Team

Commonwealth's Strategic Retirement Solutions team provides us with the support we need to help you meet all of your responsibilities as a plan sponsor. Whether it's plan design, regulatory and legislative guidance, investment product due diligence, or participant education and advice—you can feel confident that you have the specialized guidance you need and your participants have the investment options and overall value they expect and deserve. Learn more about the team below.

Karen DiStasio

Vice President, Strategic Retirement Solutions

Karen joined Commonwealth in June 2017 as director of the Strategic Retirement Solutions team. In March 2019, she was promoted to vice president. In this role, she leads the Strategic Retirement Solutions group and drives initiatives to ensure that financial advisors have the highest-quality products, services, and support available to compete in the retirement plan marketplace.

Karen has more than 20 years of experience in the financial services and retirement plan industry. She has held various marketing and business development roles at Fidelity Investments, Putnam Investments, New York Life Retirement Plan Services, and, most recently, John Hancock Retirement Plan Services.

Karen attended Smith College and graduated from the University of Massachusetts Amherst with a bachelor's degree in business administration and a concentration in marketing. She holds her FINRA Series 6 and 63 securities registrations.

Atticus
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Mat Powers, CFA,® AIF,® AIFA®

Director, Strategic Retirement Solutions

Mat joined Commonwealth in September 2014. In his current role as director of Strategic Retirement Solutions, Mat directs Commonwealth's plan investment services, including PlanAssist Investment Management, Commonwealth's 3(38) fiduciary plan service; and facilitates ongoing investment due diligence as a member of the Commonwealth 401(k) Plan Committee. He is a key member of the Commonwealth ERISA Committee where he helps to evaluate issues and opportunities related to activities covered by ERISA and make recommendations that benefit Commonwealth and its advisors. Mat leads efforts working across teams to execute department goals and ensure quality project execution and consultation in support of its advisors.

Before joining Commonwealth, Mat worked at Fidelity Investments, BNP Paribas, and Loomis Sayles. Mat has a master's degree in investment management and a bachelor's degree in information management, holds the AIF® and AIFA® designations, and is a CFA® charterholder.

Thomas Crutchfield, CFP,® AIF,® PPC,® CPFA

Manager, Strategic Retirement Solutions

Thomas joined Commonwealth in April 2012 and is currently responsible for strategic initiatives and collaboration with internal departments and third-party service provider firms. Thomas started his career in 1987 as a retirement plan advisor and has since held various client-facing and management positions with Putnam Investments, Fidelity Investments, Diversified Investment Advisors, and New York Life, focusing on client strategy and product management. Thomas previously served as the director of financial planning programs at Merrimack College, where he managed all aspects of the CERTIFIED FINANCIAL PLANNER™ curriculum.

He graduated from the University of Houston with an MS in finance and holds the CERTIFIED FINANCIAL PLANNER™ professional certification, as well as the Accredited Investment Fiduciary® (AIF®), the Professional Plan Consultant® (PPC®), and the Certified Plan Fiduciary Advisor (CPFA) designations.

Jon Good

Manager, Retirement Consulting

Jon joined Commonwealth in April 2023 as manager, retirement consulting. In this role, his responsibilities include overseeing a team of retirement consultants who field inquiries from advisors and internal teammates around retirement-related topics, including employer-sponsored and individual retirement accounts. Jon is involved with numerous product and marketing efforts to increase Commonwealth's tools and capabilities for financial advisors and maintains key vendor relationships to ensure we have cutting edge resources. Before joining Commonwealth, Jon worked at Principal Financial Group in retirement education and was previously a financial advisor.

Jon received his BS from Syracuse University and holds his FINRA Series 7, 26, and 66 securities registrations.

Dan Toomey, QKA,® CPFA

Manager, Retirement Product

Dan joined Commonwealth in December 2021 as a retirement product manager. In this role, Dan develops processes and procedures to ensure that Commonwealth meets regulatory standards, and he monitors retirement industry regulatory trends related to ERISA, DOL, and the SEC. Dan has more than 20 years of experience in the retirement industry, including 10 years working in recordkeeping and 10 years overseeing the retirement department at a professional employer organization.

He earned a bachelor's degree in English from the University of Rochester and holds the American Society of Pension Professionals & Actuaries, Qualified 401(k) Administrator, and Certified Plan Fiduciary Advisor designations.

Kara Tierney

Manager, Marketing & Communications

Kara joined Commonwealth in October 2022 as a retirement marketing and communications manager. In this role, Kara is responsible for refining and enhancing Commonwealth's existing marketing and communications strategy and programs as well as developing new strategies and initiatives in the retirement space.

Before joining Commonwealth, Kara worked at MassMutual Investments, Loomis Sayles, Wellington, Fidelity, and John Hancock Funds. She earned both an MBA and BA from Boston College.

Michael Geraci, AIF,® CRPC,® CIMA,® CRPS,® MSF

Supervisor, Strategic Retirement Solutions

Michael joined Commonwealth in February 2014. In his current role as supervisor of the Strategic Retirement Solutions team, he oversees the retirement plan investment recommended list, retirement plan investment due diligence; and performs investment manager selection for the PlanAssist Investment Management 3(38) fiduciary program. His investment specialties entail coverage across key retirement asset classes and share classes for mutual funds, commingled trusts, stable value products, and target-date portfolios.

Before joining Commonwealth, he worked at John Hancock in the Investments and Retirement Plan Services divisions. Michael began his career with Fidelity Investments in brokerage trading. He holds FINRA Series 7, 6, and 63 securities registrations; the CRPC®, CRPS®, CPFA, AIF®, CIMA®, and 401(k) Administrator designations; and Massachusetts and California life/variable insurance licenses. Michael graduated from the University of New Hampshire with a bachelor's degree in political science and Brandeis University with a master's degree in finance.

Allen Cohen, CPFA

Senior Retirement Solutions Consultant

Allen joined Commonwealth in May 2015 as a retirement sales consultant. In his current role as senior retirement solutions consultant, he fields inquiries from financial advisors and internal teammates on all retirement-related topics and initiatives.

Allen has been in the financial services industry for more than 20 years; before joining Commonwealth, he worked at State Street Bank, CitiStreet, and ING/VOYA. Allen graduated from Bates College with a BA in English and holds his CPFA designation.

Mike Triana, CRPS,® CPFA

Senior Retirement Solutions Consultant

Mike joined Commonwealth in May 2011 as a retirement operations specialist and was promoted to team lead in May 2014. In February 2017, Mike transitioned to the Strategic Retirement Solutions team as an retirement consultant. In his current role as senior retirement solutions consultant, Mike assists advisors and home office staff on a variety of retirement-related topics, ranging from traditional IRAs, Roth IRAs, and SEP/SIMPLE IRAs to distributions, beneficiary options, and portability. He stays abreast of trends and developments affecting retirement accounts, including IRS laws and regulations, as well as industry news.

Mike earned a degree in economics from Cal Poly San Luis Obispo with a concentration in management. Before joining Commonwealth, he lived in Orange County where he worked for Wells Fargo Advisors in the operations department.