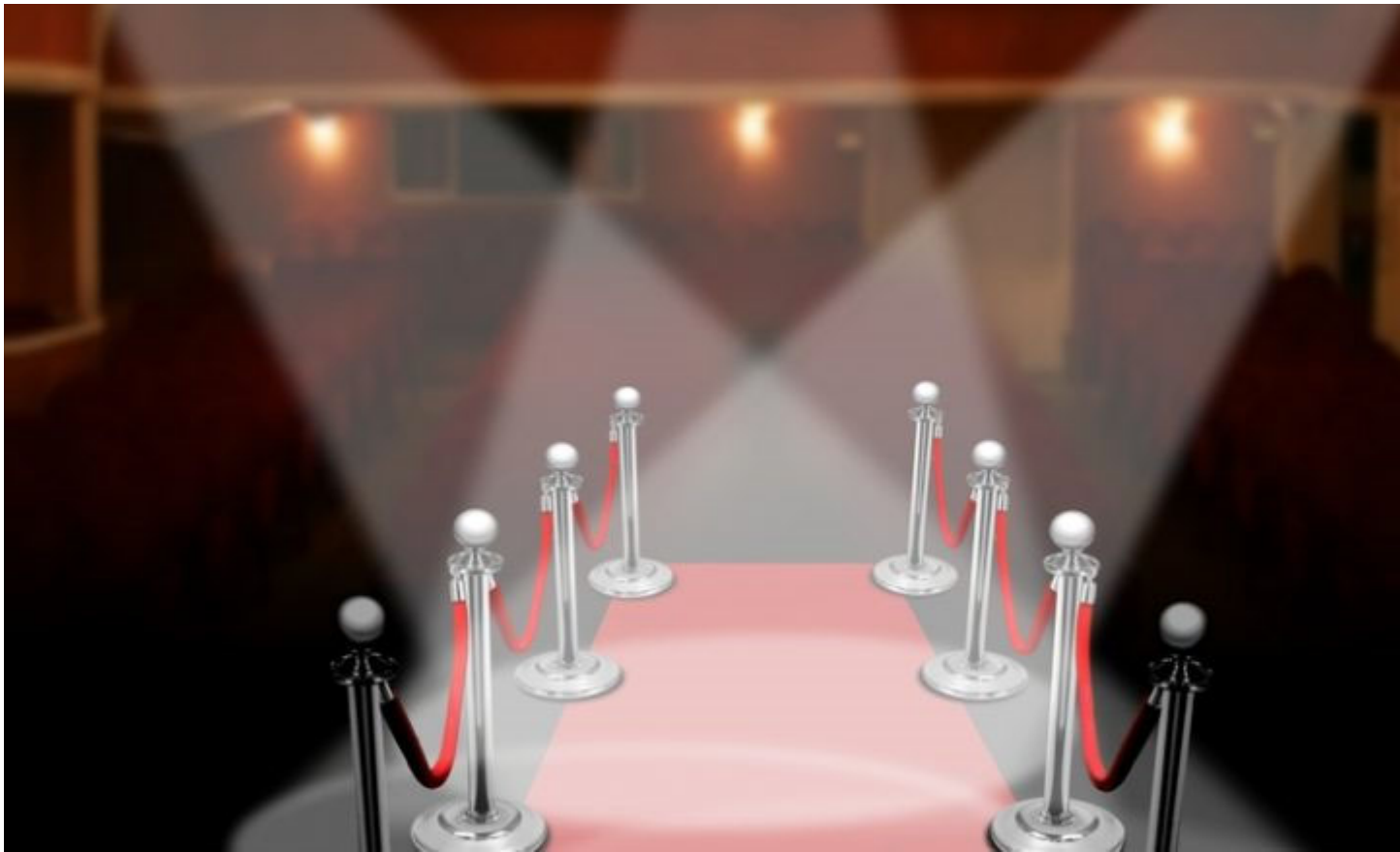


'Top Advisor by Participant Outcomes' Revealed: 2017 Excel 401k

George Fraser was chosen from a high-profile panel of judges



Things got creative and fun in the area of outcomes.

POSTED BY: JOHN SULLIVAN OCTOBER 23, 2017

Top Advisors by Participant Outcomes (TAPO), highlighted monthly by 401(k) Specialist, were celebrated at Excel 401(k): The Advisors' Conference in Las Vegas on Monday morning at the opening keynote general session.

While all the monthly TAPO designees were recognized for their creative and effective contributions to successful participant outcomes, George Fraser,

managing director of Retirement Benefits Group in Phoenix, Arizona, was named the overall 2017 Top Advisor by Participant Outcomes.

Fraser was chosen from a panel of judges convened by 401(k) Specialist, including Barbara March, CEO of Bridgepoint Group, Richard Carpenter of USVI Pensions, Tony Mingo, chairman, president and CEO of vWise and John Moody, who most recently was with Matrix Financial Solutions, a Broadridge Company.

The monthly participants were:

March Top Advisor by Participant Outcomes is Dorann Cafaro, senior advisor and founder of Cafaro Greenleaf. Dorann was recognized for her description of how to drive improved outcomes at the plan design level, and the incredible success the firm has achieved as a result.

April Top Advisor by Participant Outcomes is George Fraser. George is managing director of Retirement Benefits Group in Phoenix. George was recognized for the nudges he employs in influencing participant behavior to effectively increase 401(k) plan contributions.

May Top Advisor by Participant Outcomes is Jamie Linkowski. Jamie is president of PRIME*Solutions* Advisors in Pittsburgh, Pennsylvania. Jamie was recognized for his work in the area of financial scarcity, as well as breaking down industry silos for the benefit of his plan sponsors and participants.

June Top Advisor by Participant Outcomes is Lisa Petronio. Lisa is managing director for the Upstate New York region of Strategic Retirement Partners, a nationwide independent retirement plan consulting firm. She was recognized for her description of how she quantifies the seemingly 'unquantifiable' in determining successful participant outcomes.

July Top Advisor by Participant Outcomes is Jim Marshall, principal and founder of Wisconsin-based Spectrum Investment Advisors. Jim has over 40 years of experience in the retirement plan industry, and was recognized for his unique methods in engaging participants with financial education and wellness.

August Top Advisor by Participant Outcomes is Mike Kane, managing director of Atlanta-based Plan Sponsor Consultants. Mike was recognized for his work with behavioral finance in increasing employee participation in retirement plans.

September Top Advisor by Participant Outcomes is Mario Giganti, president and chief investment officer of Cornerstone Capital Advisors. Unfortunately, Mario has a family issue and was not able to be with us today.

October Top Advisor by Participant Outcomes, who is Jason Chepenik, managing partner with Winter Park, Florida-based Chepenik Financial. Jason was recognized for the development of a unique approach to using company events as a catalyst for greater plan participation that was deemed simple, effective and fun.

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