

2017 PLANSPONSOR

Retirement Plan Adviser of the Year Finalists



The 2017 PLANSPONSOR Retirement Plan Adviser of the Year finalists have demonstrated leadership and a commitment to excellence for their retirement plan sponsor clients and participants.

Over the years the recognition categories have shifted, but our judges continue to look for advisers that represent the best service to plan sponsors and their participants. Retirement Plan Advisers of the Year are not necessarily those with the most plans or assets under advisement (AUA). They are advisers who are doing their part to improve Americans' retirement readiness.

This year, to be eligible to be a finalist, advisers had to meet the following minimum criteria: having a majority of business revenue derived from employer-sponsored retirement plans, serving as a fiduciary, being committed to fee-based compensation and using outcome-based metrics of plan success with clients.

We are pleased to showcase the very best practices from the nation's very best advisers and adviser teams, who—by their example—help set new standards for excellence in working with and advising workplace retirement plans.

LARGE TEAM

401k Advisors Intermountain
Sandy, Utah

Plan Sponsor Consultants
Alpharetta, Georgia

Compass Financial Partners
Greensboro, North Carolina

Pension Consultants, Inc.
Springfield, Missouri

Handler Investment Consulting Group of Raymond James
Beverly Hills, California