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## Top Advisor: Mike Montgomery

**Mike Montgomery** returns to *The 401kWire's* list of finalists for the advisor awards after winning last year in the small market. And 2010 was another big year for Montgomery.

In the fall Montgomery teamed up with **Terry Power** to create a multiple employer plan, the *Platinum 401(k)*, aimed at the \$1 million to \$15 million marketplace. Montgomery's Tampa, Florida-based **Montgomery Retirement Plan Advisors** serves as the MEP's ERISA 3(38) and 3(21) fiduciary, while Power's Clearwater, Florida-based **American Pension Services** provides TPA services. In December Power confirmed that both **Hartford** and **Transamerica** have signed on as providers for the MEP.



**W. Michael Montgomery**  
Montgomery Retirement Plan Advisors  
Managing Principal

Montgomery and Power see the MEP as the future of the industry, noting that allows individual employers to hand off their plan sponsor hats while avoiding audits and other busywork involved with running their own 401(k)s.

Prior to founding his own advisory firm and teaming up with **Retirement Plan Advisory Group** for tools and **Financial Telesis** for broker-dealer services, Montgomery spent more than 27 years on the other side of the table, working as a wholesaler for several providers, including: ING, Manulife (i.e. John Hancock) and Principal.

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[Back to Top](#)