



401kWire.com

The insiders' edge for defined contribution executives!
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Who Are the Best of the Best Retirement Plan Advisors?

Which advisors are truly the cream of the crop in the defined contribution industry? In November *The 401kWire* published a list of the 300 Most Influential Advisors in the business, culling almost 3,000 nominees with help from readers who cast 120,000 votes. Now *The 401kWire* is proud to reveal the top 60 advisors from that list who are the finalists for the top advisor awards.

These advisors come from all market segments and across the country. Many of them work with retirement advisor networks like **Retirement Plan Advisory Group** (part of NFP) or **National Retirement Partners** (part of LPL), others work for insurance broker-dealers, some work for the big four wirehouses, and still others are completely independent. They offer plan sponsors different services and areas of expertise, with some focusing exclusively on sponsors and others working with both sponsors and participants.

From this list, *The 401kWire* will name four top advisors: one in the micro market (under \$5 million plans), one in the small market (\$5 million to \$15 million), one in the mid market (\$15 million to \$75 million) and one in the large market (\$75 million and up). Those four winners will be revealed at *The 401kWire's* third annual Influencers' Summit on March 8 and 9 at the Mandarin Oriental in Las Vegas, where we will honor all of the top 60 advisors. Find out more about the conference by clicking [here](#).

To help you get to know these advisors better, over the coming weeks *The 401kWire* will publish profiles of all of the top 60 advisors. Stay tuned!

The top 60 advisors are:

- **David Altimont**, Lockton Investment Advisors;

- **Stephen Brown**, Merrill Lynch;
- **Dorann Cafaro**, Cafaro Greenleaf;
- **JD Carlson**, Plan Design Consultants
- **Andres Castano**, Morgan Stanley Smith Barney;
- **Ken Catanella**, UBS;
- **Jason Chepenik**, Chepenik Financial;
- **Michael Coelho**, InvestLinc Wealth Services;
- **Luciano Costantini**, Sequoia Benefits;
- **Larry Deatherage**, Retirement Benefits Group;
- **Joseph DeNoyior**, Washington Financial Group;
- **Craig Dewey**, 401(k) Advisors;
- **Mike Falcone**, 401(k) Advisors;
- **Brendan Feitelberg**, Nautical Financial Group;
- **Tony Franchimone**, Retirement Benefits Group;
- **Stephanie Gallegos**, Thorbahn;
- **Al Gilbert**, FSRP;
- **Michael Goss**, Fiduciary Investment Advisors;
- **Bruce Gsell**, Merrill Lynch;
- **Aaron Hagwood**, Morgan Stanley Smith Barney;
- **David Hinderstein**, Strategic Retirement Group;
- **Steven Hocking**, UBS;
- **Kurt Jackson**, Central Coast Wealth Management;
- **Tim Jenkins**, Merrill Lynch;

- **Lisa Jungers**, Retirement Benefits Group;
- **Allison Kaylor**, the 401(k) Concierge;
- **Stephen Kelliher**, Morgan Stanley Smith Barney;
- **Michael Kozemchak**, Institutional Investment Consulting;
- **Ellen Lander**, Renaissance Benefit Advisors;
- **Kevin Mahoney**, Merrill Lynch;
- **Paul Massey**, the Noble Group;
- **Lee McGroarty**, RetireAmerica;
- **Matt McLaughlin**, Graystone Consulting with Morgan Stanley Smith Barney;
- **Mike Montgomery**, Montgomery Retirement Plan Advisors;
- **John Palladino**, 401(k) and 403(b) Fiduciary Advisors;
- **Bud Pernoll**, Bay Mutual Financial;
- **Fred Pieracci**, 401(k) Advisors;
- **Kyle Posvistak**, 401(k) Advisors;
- **Paul Powell**, 401(k) Advisors;
- **Douglas Prince**, Stifel Nicolaus;
- **James Radler**, Merrill Lynch;
- **Mike Rennels**, Merrill Lynch;
- **Richard Robb**, Capital Management Partners;
- **James Robison**, White Oak Advisors;
- **Jim Sampson**, Cornerstone Retirement Advisors;
- **Richard Schwamb**, Merrill Lynch;

- **Joel Shapiro**, 401(k) Advisors;
- **Jill Shea**, Shea Retirement Services;
- **John Spach**, 401(k) Advisors;
- **Philip Steele**, Pension Architects;
- **Erik Tappin**, Morgan Stanley Smith Barney;
- **Ken Ulrich**, Complete Pension Services;
- **Arch Underwood**, Alliant Insurance;
- **Christopher Venuti**, UBS;
- **Roger Vierra**, UBS;
- **Brian Ward**, Wells Fargo;
- **Julie Ward**, 401(k) Advisors;
- **Gerald Wernette**, Rehmann Financial;
- **Henry Yoshida**, the Maresh Yoshida 401(k) Group;
- and **Marc Zimmerman**, Mahoney & Associates.

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