



From The 401kWire.com

89. Mike Montgomery

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(401kWire) -

W. Michael
Montgomery
Managing Principal,
Montgomery
Retirement Plan
Advisors



2009 Rank: None
2008 Rank: None
2007 Rank: None

2009 was a year of new beginnings for **Mike Montgomery**. In August he split off his retirement plan practice from **Investech Retirement Plan Advisors** and created a new firm, **Montgomery Plan Advisors**. Montgomery also contributed to a continuing trend by aligning himself with a retirement plan advisor-focused firm and broker dealer, **Retirement Plan Advisory Group** and **Financial Telesis**.

Montgomery, who works with about \$250 million in more than 50 plans, targets defined contribution plans with between \$10 million and \$75 million in assets. Based in Tampa, Florida, he also does research consulting and training work for DC providers. (He combined that practice, Montgomery 401(k) Advisors, with his new Montgomery Plan Advisors firm in August, putting his advisory and research operations under one umbrella.)

Montgomery also knows the other side of the DC fence well. He spent more than 27 years as a wholesaler at providers such as ING, Manulife (John Hancock's parent) and Principal.

This month, *The 401kWire* named Montgomery one of the Top 40 Advisors on the 300 Most Influential Advisors in Defined Contribution list for 2009.

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