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SAGEVIEW ADVISORY GROUP RECOGNIZES EXCELLENCE
IN CLIENT SERVICE BY RECORDKEEPERS FOR THEIR SHARED CLIENTS

SageView Advisory Group (“SageView”) presented their 4th Annual Retirement Plan Service Provider *Excellence in Client Service Awards* at their business planning summit in La Jolla, California this week.

Identified by SageView’s retirement plan consultants for superior commitment and service delivery to their shared clients were:

David Edwards from Wells Fargo for his “focus and willingness to make the client experience a success for HR and for the plan participants” said Mark Forkey, Senior Investment Advisor based in SageView’s Boston office.

Christine Dolan from Empower because “she understands that clients not only want to hear the information, but also the context of the information, trends and what other similar clients are experiencing,” said Erica Washburn, Retirement Plan Consultant based in SageView’s Boston office.

Greg Diagonale from TIAA-CREF for his ability to “collaborate openly and proactively with all parties, anticipate challenges, and manage client expectations” said Nicole Labott, Retirement Plan Consultant based in SageView’s Richmond office.

Steve Levitt from Vanguard who “is not intimidated by difficult situations and was very willing to deliver reporting in a way that made it easy for our client to communicate across their organization” said Jennifer Purisima, Director of Client Service, in SageView’s Pasadena, CA office.

“For the past 4 years, we watched relationship managers work harder and stay focused while the consolidation and regulatory pressures presented challenges in addition to meeting the on-going needs for our clients. The nine (9) nominees from seven (7) different firms - Empower, Fidelity, John Hancock, Schwab, TIAA-CREF, Wells Fargo and Vanguard – were able to over-deliver on the promises made to their clients. In this market, in these times, for the clients that hire SageView, over-delivering on promises is what we do best and we appreciate it” said Randy Long, SageView’s Founder and CEO.

