



1920 Main Street
Suite 800
Irvine, CA 92614

Contact: Kaelyn Leger
949.955.7626 | kleger@sageviewadvisory.com

For Immediate Release
January 10, 2017

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

SageView Advisory Group (“SageView”) presented their 5th Annual Retirement Plan Service Provider *Excellence in Client Service Awards* at their business planning summit in Laguna, California this week.

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

Jennifer Osborne from Wells Fargo for her “valuable insights, diligence and concise meaningful summaries when presenting to our clients” said Doug Webster, Managing Director based in SageView’s Knoxville office.

Ken Present from Fidelity because “he leverages prior experiences and understands how to get things done quickly and efficiently. He listens well and understands what clients are asking and what they should be asking,” said David Shnapek, Retirement Plan Consultant based in SageView’s San Francisco office.

James Kelley from TIAA-CREF for his ability to “he is always client-centric and very focused on moving open items to closure” said Jonathan St. Clair, Retirement Plan Consultant based in SageView’s Atlanta office.

Heather Monaco from John Hancock Retirement Services who “does all the work behind the scenes, is fully prepared, so when she gets in front of the clients, she makes everything look easy” said Jeff Petrone, Managing Director, in SageView’s West Palm, FL office.

“We very much appreciate and feel it is our obligation to recognize excellence in client service. It cannot be over-stated how valuable the quality client service delivered by the Jennifer, Ken, James and Heather through the past few years has impacted our shared clients. They are this year’s gold standard and we will do our best to continue to share with our partners how their team members can achieve these standard.” said Randy Long, SageView’s Founder and CEO.

