



1920 Main St., Ste. 800
Irvine, CA 92614
800.814.8742
www.sageviewadvisory.com

NEWS RELEASE

Contact: Julie Katsnelson
949.955.7626 | jkatsnelson@sageviewadvisory.com

For Immediate Release
9/14/2020

SAGEVIEW WELCOMES MARGARITA CROSS TO NORTHERN CALIFORNIA TEAM

IRVINE (SEPTEMBER 14, 2020) – SageView Advisory Group, one of the leading independent retirement plan advisory firms in the nation, today announced the addition of Margarita Cross as a Retirement Plan Consultant in Northern California.

In her role, Margarita proactively supports her clients' retirement programs and assists plan sponsors with plan design, administration, consulting, compliance testing analysis, and investment reviews.

She began her career at a small RIA firm in San Ramon, CA before moving on to Transamerica Retirement Solutions as a Client Relationship Manager. At Transamerica, Margarita managed more than 50 corporate retirement plans.

Margarita joins our Woodside, CA office, which is led by Managing Director Robert Patton and includes Ann Cheu, William Posch, David Shnapek, Eric Weissman and Chris Krall. Together, the Woodside team manages over 90 client relationships totaling \$7.5 billion in assets.

"The addition of Margarita is great news for our clients and SageView; we are really excited to have her on the team," said Robert Patton. "Her strong background in retirement plan administration and investment oversight will help our clients right out of the gate."

Randy Long, SageView Founder and CEO, added "Margarita has the unique experience of working on both the advisor and recordkeeper side of the retirement business, offering an invaluable perspective to our clients and strengthening the overall client experience."

About SageView Advisory Group

SageView Advisory Group is an SEC Registered Investment Advisory firm (RIA) serving retirement plan sponsors and individuals throughout the United States since 1989. SageView advises on 401(k), 403(b), 457, defined benefit and deferred compensation plans. SageView is headquartered in Irvine, California with 25 offices nationwide.

For more information about SageView, visit www.sageviewadvisory.com or call (800) 814-8742.