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News Release

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SageView Advisory Group Expands By Adding Retirement Plan Consultant to Northeast Practice

Increased demand for independent client focused retirement plan consulting enables SageView's Boston office to recruit industry expert

IRVINE, CA (May 18, 2015) – SageView Advisory Group, an independent retirement and wealth management consulting firm, is pleased to announce the addition of Kerrie Casey to its Boston Practice. Ms. Casey is a seasoned investment professional and client relationship manager with more than 19 years of experience delivering quality retirement plan consulting and services to corporate and not-for-profit plan sponsors.

In her new role as Retirement Plan Consultant, Ms. Casey will be a lead contact for new clients choosing to work with SageView, lead vendor RFPs, and focus on strategic plan design and tactical delivery of the retirement benefits for the plan sponsor. Ms. Casey will also participate on the firm's Investment Committee.

Stephen R. Popper, the Managing Director of SageView's Boston Office, said, "Kerrie is an all-star. Everyone we have spoken to in our market respects her client-centric approach. I witnessed her ability to help employers make a difference in helping participants' successfully save when her client won a Best Practice acknowledgment in 2009 from the New England Employee Benefits Council. She brings a wealth of knowledge and experience to our clients. Her personality is a calming influence that will enable our client's retirement plan committees to make knowledgeable, sound decisions that can stand the test of time."

"Bringing on Kerrie now will continue our practice of limited account management turnover. She will be introduced to the clients at the beginning of the engagement and be able to focus on their needs," Popper continued.

Kerrie's diverse background includes time on recordkeeping, employee education, implementation, compliance and consulting at Fidelity, Tofias, Sentinel Benefits and MMA-New England, formerly the Bostonian Group.

Ms. Casey earned her Bachelor of Science in Finance from Bentley College and her Masters in Arts from UMass Boston. She holds multiple securities registrations, is a Qualified 401(k) Administrator (QKA) and an Accredited Investment Fiduciary® (AIF).

About SageView Advisory Group
Headquartered in Irvine, California, SageView Advisory Group is an independent Registered Investment

Advisory firm specializing in helping retirement plan sponsors fulfill their fiduciary responsibilities. SageView's team of professionals currently oversees more than $38 billion in assets. For more information, call (800) 814-8742 or visit www.sageviewadvisory.com.

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