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NEWS RELEASE

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FINANCIAL TIMES NAMES 15 SAGEVIEW ADVISERS IN TOP RANKING

IRVINE (October 10, 2019) – The Financial Times released its 2019 edition of the FT 401 Top Retirement Advisers today, naming 15 SageView advisers to the list. The list recognizes the top financial advisers who specialize in serving defined contribution (DC) retirement plans across the U.S.

This is the fifth annual FT 401 list, produced independently by the Financial Times in collaboration with Ignites Research, a subsidiary of the FT that provides business intelligence on investment management.

Financial advisers from across the U.S. applied for consideration, having met a set minimum of requirements. The applicants were then graded on six criteria: DC assets under management (AUM); DC AUM growth rate; specialization in DC plans; years of experience; advanced industry credentials; and compliance record. There are no fees or other considerations required of advisers who apply for the FT 401.

The final FT 401 represents an impressive cohort of elite advisers: the “average” adviser in this year’s FT 401 has over 22 years of experience advising DC plans and manages $1.6 billion in DC plan assets. The FT 401 advisers hail from 40 states and Washington, D.C., and DC plans on average account for 84% of their total assets under management.

The following SageView advisers were listed in the ranking: Tim Burns, CFA; Jon Chambers, QPFC; Michael Coelho, C(k)P, AIF®; Mark Foster, AIF®; Clinton Heine, AIF® David Lum, AIFA®, CIMA®; James McCrary, Robert Patton, AIF®; Jeffrey Petrone, AIF®, QPFC; Stephen Popper, AIF®, QPFC; Chris Reagan, AIF®, CIMA®; Wayne Roth; Jonathan St.Clair, JD; Edward Wagner, AIF®; and Doug Webster, QPFC, AIFA®.

“SageView is pleased to have 15 advisors included for the second consecutive year and congratulates everyone who made the list. Each of these outstanding individuals are client and participant advocates and an excellent representation of SageView’s commitment to best-in-class retirement plan consulting services,” commented Randy Long, SageView Founder and Managing Principal.

The FT 401 Top Retirement Advisers ranking can be viewed here.

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, with over $101 billion in assets under management. SageView is headquartered in Irvine, California with 25 offices nationwide.

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