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## News Release

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### **SAGEVIEW ADVISORY GROUP RECOGNIZES EXCELLENCE IN CLIENT SERVICE BY RECORDKEEPER RELATIONSHIP MANAGERS**

SageView Advisory Group (“SageView”) presented their 6th Annual, Retirement Plan Service Provider - *Excellence in Client Service Awards* at their business planning summit in Laguna Beach, CA last week. Identified by SageView’s retirement plan consultants for superior commitment and service delivery to their shared clients were:

**Betina Alexa** from Lincoln Financial for her “enjoyment in finding the best way to solve problems, bringing her best resources to a client project, developing strategies and delivering an honest and productive outcome”, as explained Shelly Schaefer, Retirement Plan Consultant based in SageView’s Milwaukee, WI office.

**Brian Curtin** from MassMutual because “he leverages his years in operations and desire to see his team members share in the successful delivery of services, putting the client, the team and his company before himself.” Brian was nominated by Rachel Zachary, Retirement Plan Consultant based in SageView’s Fulton, MD office.

**Aimee Hendershott** from Principal for her ability to “lead her team, focus on the tasks at hand and deliver in a plan sponsor centric approach, giving them what they need in the way they want to see it” said David Shnapek, Retirement Plan Consultant based in SageView’s Woodside, CA office.

**Heidi Kielich** from Fidelity Workplace Solutions working with four different SageView relationship managers, “has the ability to foresee potential challenges and address them ahead of time to avoid any hiccups. She is a thoughtful solution seeker, who makes the effort to research each situation and never makes assumptions before trying to meet the clients’ needs,” said Brenda Tarjan from SageView’s Irvine, CA office.

“Client service: It’s the core value of SageView. We educate, consult and solve problems for our clients. We value the relationship managers who exceed our clients’ expectations and do it a way to make us all more successful. Those recognized this year, not only make the clients *look* good, but make their internal team members *feel* good in achieving the clients’ goals and ambitions.” said Randy Long, SageView’s Founder and CEO.

#### **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 23 offices nationwide.*

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