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## NEWS RELEASE

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

IRVINE (January 21, 2020) SageView Advisory Group (“SageView”) presented the 8th Annual Retirement Plan Service Provider *Excellence in Client Service Awards* at their National Conference in Dana Point, California last week.

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

**Jane VanderWerf from Empower, as nominated by Ann Cheu, Retirement Plan Consultant out of Woodside, CA:** “Jane recently took over a relationship that didn’t start off on the right foot. It was a small plan that converted from a PEO. She knew immediately what to do to get the relationship on the right track. For example, instead of the pooled client service team, she got approval to get a dedicated client service person assigned on the account. In addition, she took the lead on all administrative issues, giving the client confidence that things were getting back on track.”

**Amber Bastian from Prudential, as nominated by Nick Jahn, Retirement Plan Consultant based in Knoxville, TN:** “Humble, sincere and dynamic. Amber’s client-first approach, knowledge, expertise and overall relationship savvy are constantly on display as she provides consistent quality service to our clients. It is a real pleasure to work with such a professional.”

**Jamie Weber from Lincoln, as nominated by Ji Mi Tsang, Retirement Plan Consultant in Honolulu, HI:** “Jamie has been outstanding in supporting our clients through everything from plan terminations and acquisitions to numerous plan design and fund changes. She is very responsive and always works quickly and efficiently to move open items to closure with just the right tone to let everyone know she is there to serve. Jamie is great at following up with clients on matters related to the audit, census, testing, or any other outstanding issues.”

**Martha Bone from Principal, as nominated by Stacy Walters, Retirement Plan Consultant from West Palm Beach, FL:** “Martha’s commitment to her client base, internal partners and external partners is honorable and praiseworthy. She goes above and beyond, making herself very accessible to her clients and her partners. Martha’s preparation is what separates her from others: data mining the plan’s statistics and tying communications and actions to impact. She makes each meeting more meaningful. She does a great job telling a story and keeping the client engaged.”

“Without a doubt, this is one of the strongest classes of relationship managers recognized by SageView team members. Each year, we look to raise the bar and expect more for our clients, holding both ourselves and the recordkeepers accountable. We always try to exceed; Martha, Jamie, Amber and Jane have clearly done so, and we are proud to acknowledge their hard work and dedication to our shared clients.” said Randy Long, SageView 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, with over \$104 billion in assets under management. SageView is headquartered in Irvine, California with 25 offices nationwide.*

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