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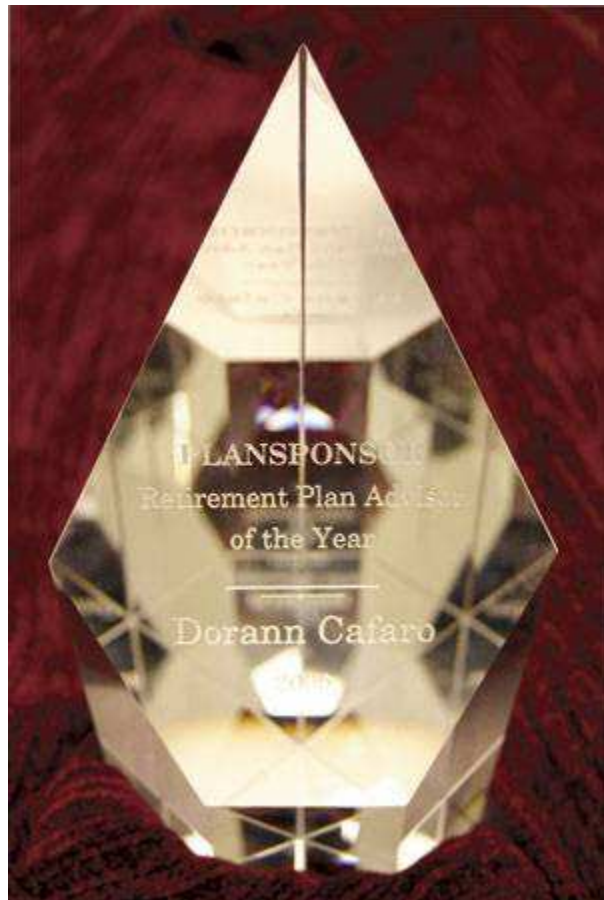
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PLANSPONSOR Announces Finalists for 2008 Retirement Plan Adviser of the Year Award

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January 15, 2008 --- Today, PLANSPONSOR announces the finalists for its annual Retirement Plan Adviser and Adviser Team of the Year awards. ---



The award, launched in 2005, recognizes the contributions of the nation's best financial advisers in helping make retirement security a reality for workers across the nation.

Nominations for the Retirement Plan Adviser and Adviser Team of the Year awards were solicited online from retirement plan advisers, their employers and/or broker/dealers, and plan sponsors, as well as from working partners of these advisers, including investment vendors, accountants and attorneys, and pension administrators (advisers who have attained the **PLANSPONSOR** Retirement Professional designation receive an automatic nomination). The finalists were selected

by an expert panel of judges from a list of semifinalists compiled from a quantitative evaluation of their current service levels and, based on interviews with their plan sponsor clients. The winners will be announced at the annual *PLANSponsor/PLANADVISER* Awards Dinner on April 3, 2008, in New York City.

This year's finalists were drawn from a pool of 332 nominations representing more than 200 advisers. Ten advisers received five or more nominations. Information was collected from 216 advisers and, of those, 127 advisers (78 teams and 49 individuals) completed the entry form in its entirety, making them eligible for the award.

The finalists for the Retirement Plan Adviser of the Year are:

[Gregg Andonian](#), Baystate Fiduciary Advisors, Inc., a Member Firm of NRP, Milford, MA

[John Leeson](#), Investment Research & Advisory Group, Inc., Atlanta, GA

[John Barry](#), JMB Wealth Management/National Planning Corporation, Torrance, CA

[James Sampson](#), Telamon Insurance & Financial Network, Newton, MA

[Tom Noble](#), Noble Retirement Group, a Member Firm of NRP, Sugar Land, TX

The finalists for the Retirement Plan Adviser Team of the Year are:

[Longfellow Benefits](#), a Member Firm of NRP (Kendall Storch, Phil LeBlanc, David Boucher, Andrew Hershenow, Adam Miloro), Boston, MA

[CAPTRUST Financial Advisors](#) (Mark Medlin, Mike Hudson), Raleigh, NC

[The Howell & Sharp Group at Merrill Lynch](#) (Brett Howell, Craig Sharp), Grand Rapids, MI

[Heffernan Financial Services](#), a Member Firm of NRP (John Prichard Sr., Blake Thibault), San Francisco, CA

[FFoA](#), a Member Firm of NRP (Barbara Delaney, Cathy O'Halloran, Martha Kelly, Kylee Hall), Pearl River, NY

The Retirement Plan Adviser of the Year and the Retirement Plan Adviser Team of the Year will be profiled in more detail in future issues of *PLANSponsor* magazine and *PLANADVISER* magazine, and will receive a free registration to the 2008 **PLANADVISER** National Conference.

"Advisers have become indispensable members of the team for most workplace retirement plans," says Nevin Adams, Editor-in-Chief of *PLANSponsor*. "The criteria that underlie the award are simple but impactful; we want to recognize advisers who make a difference through increasing participation, boosting deferral rates, enhancing asset allocation, and/or providing better programs through expanded service or expense management."

Previous winners of the award include Chad Larsen with Moreton Financial Solutions in Denver, Colorado (2007); Dorann Cafaro of The Cafaro Group in Little Silver, New Jersey (2006); and John Mott of Smith Barney in Houston, Texas (2005). The inaugural **PLANSponsor** Retirement Plan Adviser Team of the Year was the STAR Group with Merrill Lynch in Akron, Ohio, in 2007.

A list of the most successful advisers taken from those nominated for the award can be found [here](#). More information about the award and prior recipients is online [here](#).

PLANADVISER Staff

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