

PRESS RELEASE – FOR IMMEDIATE RELEASE

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**PlanPILOT Named to 2020 PLANADVISER Top 100 Retirement Plan Advisers**

**CHICAGO, IL – March 06, 2020** – PlanPILOT is pleased to announce it has been named as one of the 2020 PLANADVISER Top 100 Retirement Plan Advisers.

The PLANADVISER Top 100 Retirement Plan Advisers is an annual listing of adviser individuals and teams that stand out in the industry in terms of a series of quantitative measures. These include the dollar value of qualified plan assets under administration (AUA), as well as the number of plans under advisement.

planadviser's **2020**  
**TOP100**  
RETIREMENT PLAN ADVISERS

PlanPILOT was recognized in the “Small Teams With \$1.7 Billion or More in Retirement Plan Assets Under Advisement” and “Small Teams With 115 Retirement Plans or More Under Advisement” categories.

“We are honored and excited to be recognized for the third year in a row,” said Mark Olsen, Managing Director. “The PlanPILOT team is proud to rank among the top 100 advisers. This is a testament of our dedication to our retirement plan sponsor clients. We will remain committed to providing top-notch fiduciary services and creating solutions that lead to our clients’ and their participants’ success.”

The Top 100 Retirement Plan Advisers is segmented into four groups based on the number of advisers and number of total employees including support staff: Individual advisers are one adviser with support staff; a small team comprises of two or more advisers and support staff, the total not exceeding 10; a large team is a group of 11 to 35 advisers and support staff; mega teams have 36 or more team members.

To qualify for a particular segment individuals needed to advise a minimum of 100 plans or \$950 million in retirement plan AUA; small teams had to advise at least \$1.7 billion in retirement plan assets or more than 115 plans; large teams needed \$3.5 billion or more in retirement plan AUA or 150 or more plans; and mega teams had to oversee at least \$10 billion in retirement plan AUA or more than 300 plans.

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### **PLANADVISER Top 100**

The “PLANADVISER Top 100 Retirement Plan Advisers” list is compiled from responses to the PLANADVISER Retirement Plan Adviser Survey. The list is drawn solely from a set of quantitative variables and information in the survey supplied by the advisers themselves. For an adviser to be eligible for recognition in this year’s Top 100, he had to submit a completed entry to our 2019 Retirement Plan Adviser Survey, which was fielded this past September. A sub-segment of the questions was used to determine eligibility for the Top 100.

### **PLANADVISER**

Through its magazine, website, events and email newsletter, PLANADVISER, a part of Strategic Insight, provides comprehensive industry news, regulatory and investment information, research and training to financial advisers who specialize in the sale, design and administration of institutional qualified and nonqualified retirement plans and executive compensation plans, including 401(k), defined benefit and deferred compensation plans. For more information, please visit [www.planadviser.com](http://www.planadviser.com).

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### **About PlanPILOT**

*PlanPILOT was founded in 2011 by 20+ year consulting industry veteran Mark Olsen with a vision to provide superior client service by bundling the knowledge of plan design, governance and investments in a comprehensive, cohesive client delivery model. As an independent Registered Investment Advisor (RIA), PlanPILOT partners with our clients as a fiduciary, under ERISA §3(21) or §3(38), to control the business risks associated with operating plans and helps deliver the benefits intended.*