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401(k) Champion® Award Seeks Applications

Award recognizes 401(k) participants who demonstrate the importance of retirement saving and mentoring others

Application Deadline: October 1, 2021

STAMFORD, Conn., September 7, 2021 – In honor of 401(k) Day on September 10, applications will open for the third annual 401(k) Champion® Award, which is the only national award that recognizes 401(k) participants who *love* their 401(k)s.

Those who apply for the award, sponsored by Jackson, Grant Investment Advisers, Inc. and its founder, Julie Jason, will compete for three \$1,000 prizes by writing essays explaining how they not only use their 401(k)s for retirement security, but also mentor others to do so as well. The applications are available at 401kchampion.com.

“A peer-to-peer message from one 401(k) participant to another,” said Jason, “can be more powerful than reading a brochure, attending an employee enrollment session, or trying to navigate an online tool. That’s what this award is all about—inspiring grassroots education and encouragement.”

David Wray, retired Plan Sponsor Council of America President who is serving as an adviser to the 401(k) Champion® effort, added: “I have learned from years of experience that 401(k) success is enhanced when principles are not only taught but reinforced by trusted co-workers.”

About the 401(k) Champion® Award

Jackson, Grant launched the 401(k) Champion® Award in 2018 after recognizing that, within the 401(k) space, there were awards that honored companies’ plans, but none that focused on 401(k) participants. Jason explained: “In my decades of experience working with investors directly or indirectly through my financial literacy education efforts, I saw the need to shine a light on



participants who took the time to learn about their 401(k)s and encouraged others to optimize them.”

Three Champions will receive cash awards of \$1,000 each based on an essay submitted online. The judges will consider applicants’ answers to these questions: 1) If you were to advise co-workers on why they should participate in (and/or maximize) their 401(k)s, what would you say? 2) What actions have you taken to inspire non-participants to participate in the 401(k)?

Apply for the 401(k) Champion® Award

Individuals can find a link to the application and award rules at 401kchampion.com. Plan sponsors are encouraged to share information on the award with participants who may qualify.

The award is open to all ages 21 or older who currently participate in their 401(k)s. The deadline to submit applications is October 1.

About the sponsors

The award is the initiative of financial literacy proponent, Julie Jason, and her firm, Jackson, Grant Investment Advisers, Inc. (Stamford, Conn.). Jackson, Grant Investment Advisers, Inc. is an independently owned fiduciary boutique that serves high-net-worth families (\$5 million minimum) as investment counsel. The firm is SEC registered, with offices in Stamford, Conn. www.jacksongrant.us Tel: 203-322-1198

Founder, Julie Jason, JD, LLM, got her start on Wall Street as a lawyer. Using insights gained from 30 years in money management and law, she writes for audiences of every financial means, promoting investor education and protection through her award-winning column (syndicated by Andrews McMeel Syndication), Forbes.com posts, and her books. www.juliejason.com

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