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**Media Contact:**  
Greg Avdoian  
The Lowe Group  
[Greg.Avdoian@lowecom.com](mailto:Greg.Avdoian@lowecom.com)  
414-376-7240

**Media Contact:**  
Chris Richcreek  
Jackson, Grant Investment Advisers, Inc.  
[Chris@juliejason.com](mailto:Chris@juliejason.com)  
203-322-1198

**401(k) Champion® Award Competition Welcomes Industry  
Leaders to 2021 Judging Committee**

**Calling all 401(k) participants—are you the next 401(k) Champion®?**

**Nominate or Apply Now**

STAMFORD, Conn., September 22, 2021 – The national 401(k) Champion® Competition is pleased to announce an expanded roster of judges to evaluate competitors' (401(k) participants) knowledge of 401(k)s. Judges will choose three 401(k) Champions® for 2021 based on two essay questions posed in the award application (401kchampion.com).

The 401(k) Champion® Award Competition welcomes:

- Nevin Adams, Chief Content Officer with the American Retirement Association. The American Retirement Association is a non-profit professional organization with two major goals: to educate all retirement plan and benefits professionals, and to create a framework of policy that gives every working American the ability to have a comfortable retirement. Formerly, Adams was Director of Education and External Relations at the Employee Benefit Research Institute (EBRI); Global Editor-in-Chief, PLANSPONSOR.
- Rebecca Moore, Associate Director at ISS Media, and the digital managing editor of PLANSPONSOR. As the nation's leading authority on retirement and benefits programs, PLANSPONSOR is dedicated to helping employers navigate the complex world of



retirement plan design and strategy through an award-winning magazine, website, newsletters, events, multimedia and social connections. ISS Media is a business unit of Institutional Shareholder Services (ISS), a provider of corporate governance and responsible investment solutions, market intelligence, fund services, and events and editorial content for institutional investors and corporations, globally.

*The American Retirement Association, PLANSPONSOR and ISS are not affiliated with the 401(k) Champion® Award Competition or the award's sponsors.*

Returning judges are:

- Anthony Aiken, CPA, CVA, MS, retired founder of Aiken & Company, PC.
- Adam Berkowitz, Associate Executive Director of New Heights Youth, Inc., a non-profit sports-based youth-development and educational organization based in New York City.
- Manny Bernardo, retired Human Resources Benefits Executive, former Director of Employee Benefits Tax Services for Deloitte & Touche Tristate, and former Benefits Specialist Attorney.

David Wray, a long-time advocate for the 401(k) as a retirement savings tool and retired president of the Plan Sponsor Council of America, serves as adviser to the award competition.

“We are excited to work with our slate of industry leaders to encourage participation in this year’s competition and to identify three 2021 401(k) Champions®,” said Julie Jason. Jason created the annual 401(k) Champion® Award Competition and she and her firm, Jackson, Grant Investment Advisers, Inc., sponsor the award. Jason also serves as a judge.

### **About the 401(k) Champion® Award**

Jason and Jackson, Grant launched the 401(k) Champion® Award in 2018 after recognizing that, within the 401(k) space, there were awards that honored plan sponsors, but none that focused on 401(k) participants.

Jason explained: “In my decades of experience working with investors directly through my firm or indirectly through my financial literacy education efforts, I saw an opportunity to encourage grass roots involvement. It was time to shine a light on participants who not only knew how to optimize their 401(k)s but encouraged others to do the same. That’s what the 401(k) Champion Competition is all about – learning and leadership.”



Three 401(k) Champions® will receive cash awards of \$1,000 each based on an essay submitted online. The judges will consider applicants' answers to two 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)?

### **Compete for the Title of 2021 401(k) Champion®**

401(k) participants can compete for the title of 401(k) Champion® by applying at [401kchampion.com](http://401kchampion.com). Plan sponsors are encouraged to share information about the award with 401(k) participants.

The award is open to all ages 21 or older who currently participate in their 401(k)s, whether working or retired. Applications must be received by Friday, Oct. 1. See the award rules at [401kchampion.com](http://401kchampion.com) for more details.

### **About the Sponsors**

Julie Jason is a long-time vocal proponent of investor education. Her first two books focused on 401(k)s. In 1996, she authored "You and Your 401(k): How to Manage Your 401(k) for Maximum Returns," and in 1997, "The 401(k) Plan Handbook," a guide for sponsors. Her more recent books include "The Retirement Survival Guide" (2017 update of "The AARP Retirement Survival Guide") and "Retire Securely," both recipients of the EIFLE (Excellence in Financial Literacy Education) Award. Her upcoming book is a retirement guide for lawyers, called "The Discerning Investor," to be published by the American Bar Association. [www.juliejason.com](http://www.juliejason.com)

Jason is the founder of Jackson, Grant Investment Advisers, Inc., investment counsel serving high-net-worth families. [www.jacksongrantus.com](http://www.jacksongrantus.com)