



## FOR IMMEDIATE RELEASE

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## Calling All 401(k) Participants: Are You the Next 401(k) Champion<sup>®</sup>?

### Competition deadline extended to Thursday, Nov. 17, 2022

STAMFORD, Conn., Oct. 24, 2022 – The 401(k) Champion<sup>®</sup> Competition, the only national award of its kind that recognizes 401(k) participants who “love” their 401(k)s, announces the deadline to compete is now Thursday, Nov. 17, 2022.

Those who apply for the award will vie for three \$1,000 prizes by writing essays explaining how they not only use their 401(k)s to save for retirement, but also how they might encourage others to do the same. Apply today at [401kchampion.com](http://401kchampion.com).

### Inspiring Grassroots Education and Encouragement

“A peer-to-peer message from one 401(k) participant to another,” said Julie Jason, founder and sponsor of the award, “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<sup>®</sup> 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.”

Nevin Adams, Chief Content Officer with the American Retirement Association and a returning judge for the award, attests: “There’s nothing quite as powerful an inspiration as the first-hand account of an actual 401(k) saver. The award not only acknowledges that impact, it amplifies it and encourages others to emulate that success.”



## **About the 401(k) Champion® Award – Learning and Leadership**

Jason created 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.

“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,” said Jason.

Three 401(k) Champions® will receive cash awards of \$1,000 each based on an essay submitted online. A panel of 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)?

### **A 401(k) Champion’s® Point of View**

A 2021 401(k) Champion®, Robert Brokamp, senior adviser, author and podcaster at The Motley Fool, attested to the award’s positive impact. “I love the spirit of the 401(k) Champion® Award,” Brokamp explained. “It acknowledges that everyday employees can be motivators and educators, improving retirement security for themselves and their coworkers.”

### **Compete for the Title of 2022 401(k) Champion®**

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

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 Thursday, Nov. 17. See the award rules at [401kchampion.com](https://401kchampion.com).

### **About the Judges**

The applications will be judged by: Nevin Adams Chief Content Officer with the American Retirement Association; Adam Berkowitz, Associate Executive Director of New Heights Youth, Inc.; and Manny Bernardo, retired Human Resources Benefits Executive. *The American Retirement Association, PLANSPONSOR and ISS are not affiliated with the 401(k) Champion® Award Competition or the award’s sponsors, nor are the other companies noted.*



## About the Sponsors

The award is the initiative of financial literacy proponent, Julie Jason, JD, LLM, and her firm, Jackson, Grant Investment Advisers, Inc. (Stamford, Conn.), a boutique investment counsel for select high net worth families and proponents of financial literacy for all.

Through her financial literacy efforts, Julie Jason shares insights gained from 30+ years in money management and law, with a focus on investor protection. Read her columns, forbes.com posts, and more information about her books at [juliejason.com](http://juliejason.com).

Her latest book, “The Discerning Investor: Personal Portfolio Management in Retirement for Lawyers (and Their Clients),” was just released by the American Bar Association and explores the conflicts of interest and fiduciary responsibilities for retirees. [jacksongrant.us/next-steps/the-discerning-investor](http://jacksongrant.us/next-steps/the-discerning-investor).

Visit Jackson, Grant Investment Advisers, Inc., the independent fiduciary boutique founded by Jason in 1992. The firm is SEC registered, with offices in Stamford, Conn. [jacksongrant.us](http://jacksongrant.us) Tel: 203-322-1198