



Media Contact:

Jody Lowe
The Lowe Group
jody@lowecom.com
414-376-7638

Media Contact:

Chris Richcreek
Jackson, Grant Investment Advisers, Inc.
chris@juliejason.com
203-322-1198

National Competition Selects Three 401(k) Champions[®]

Only award of its kind given to 401(k) participants who demonstrate the importance of retirement saving

STAMFORD, Conn., Nov. 23, 2021 – The national 401(k) Champion[®] Competition, the only national competition that recognizes successful 401(k) participants, is pleased to announce this year's 401(k) Champions[®].

Congratulations to:

- Robert Brokamp, Fairfax Station, VA, Employer: The Motley Fool
- Kiersten Peshek, Chicago, IL, Employer: Citrine Capital
- Jack Towarnicky, Powell, OH, Employer: Aequum

The Purpose of the 401(k) Champion[®] Competition

The purpose of the 401(k) Champion[®] Competition is to:

- Energize 401(k) participants to learn more about 401(k)s
- Identify and share the stories of 401(k) Champions[®]
- Encourage a dialogue about 401(k)s and retirement security
- Help employers share their 401(k) benefits with employees

An independent panel of expert judges considered 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)?

You can link to the winning essays here: <https://401kchampion.com/our-champions/>



About the Judges

The applications were judged by:

- 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.
- 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.
- 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.

David Wray, a longtime 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.

About the 401(k) Champion[®] Award

Financial literacy proponent, Julie Jason, created the 401(k) Champion[®] Competition 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.



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

Get ready for the next 401(k) Champion® Competition

Information on the next annual 401(k) Champion® Competition will be posted on the award [website](#) in 2022. The contest is open to 401(k) participants age 21 and older.

Plan sponsors are encouraged to share information about the competition with their employees by going to <https://401kchampion.com/for-employers/> and downloading a flyer with information about the 401(k) Champion® Competition.

About the Sponsors

Julie Jason, JD, LLM, is a longtime 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

Jason is the founder of Jackson, Grant Investment Advisers, Inc., investment counsel serving high-net-worth families. www.jacksongrantus.com

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