NTSA
National Tax-Deferred
Savings Association

2021–2022

NTSA AWARDS STORIES

NTSA-NET.ORG

WELCOME, NTSA WORLD...

Across the globe and within our own industry, we communicate more often – and in more ways – than we ever have before. More communication results in more, and faster, changes to our jobs and our lives. This pace of change will continue to accelerate.

Despite this frenzied pace of change, some things remain unchanged. Creativity, hard work, and the willingness to selflessly serve others are traits that will remain forever. These are the traits displayed every year by our NTSA award winners.

The winners of the NTSA Bob D. Schiller Award, the Richard Ford Volunteer Service Award, and the Elite Advisor Award are individuals who continue to serve others intentionally despite the frenzied pace of their lives. For that, we are all thankful.

The membership and staff of NTSA and ARA thank and congratulate each of our 2021 and 2022 award winners. You inspire us to continue to improve our organizations and ourselves.

MARK LUCKINBILL
NTSA Executive Director

ABOUT NTSA

ADVOCATE. EDUCATE. GROW.

The National Tax-Deferred Savings Association (NTSA) – a division of the American Retirement Association (ARA) – focuses on the needs of the tax-exempt and nonprofit marketplace as well as public educational institutions. NTSA accomplishes that by leading, advocating, and educating with their diverse professional membership of financial advisors, consultants, administrators, and product creators and providers, all dedicated to meeting client needs. ARA membership – more than 26,000 – is diverse, but united by a common dedication to the employer-based retirement plan system.

Formed in 1989, NTSA is nationally recognized for its thought leadership and policy expertise. With more than 6,000 members, it provides consulting and administrative services for ERISA nonprofit, 403(b), and 457(b) plans covering millions of American public and private workers.

On the advocacy front, the NTSA mission is to work effectively and proactively with state and local governments to advance public and private tax-exempt and nonprofit employee retirement security, based on the tenets of open access, ethical practices, and universal standard of care.

NTSA represents its membership in state capitals across the country and in Washington, D.C. to promote public policy, address issues, and design retirement plans that improve employee outcomes. In addition, NTSA coordinates with ARA in its federal-level advocacy on behalf of its Divisions of Membership.

On the education front, the NTSA mission is to provide high quality, forward-thinking, and diverse education opportunities. This professional development for and with plan sponsors, key decision makers, employees, and related parties focuses on the needs of the following target markets: K-12, higher education, healthcare, church, nonprofit, 457(b), and Taft Hartley.

ABOUT THE BOB D. SCHILLER AWARD

The NTSA Bob D. Schiller Award is now a lifetime recognition award honoring individuals who have given freely of themselves, and their time and resources, to NTSA and to the 403(b), 457(b), and nonprofit plan retirement industry. These individuals have gone above and beyond expectations, making a difference for their clients and for the industry.

The award – named in memory of Bob Schiller, an enthusiastic supporter of NTSA who devoted his time and energy to its success – is given at the discretion of NTSA's President. Bob, a member of the Lincoln Investment team, was a mentor to many in NTSA. His untimely passing in 2006 led NTSA to create this award.

2021 BOB D. SCHILLER AWARD

KENT SCHUTTE
TGPC, CRES, CLU, ChFC, CFP®
EFS Advisors, Cambridge, MN

Kent Schutte is the President of EFS Advisors, LLC and Educators Benefit Consultants. His company is a long-time Strategic Partner of NTSA and Kent himself served as NTSA President in 2015. Kent has been involved at all levels of NTSA from his time in leadership to volunteering on the Awards Judging Committee for the Elite Advisor Awards, sharing his successful projects with Summit conference audiences and supporting the CRES designation.

While no stranger to NTSA, Kent has been working with educators, nonprofit, and governmental plans since 1985. In 2018, Kent was named an Elite Advisor and in 2021, Kent was awarded the Ford Volunteer Service Award. “Over the past 30 years, I met with thousands of educators and truly believe that most are underpaid and underappreciated, yet society expects them to sculpt the future of America. If I can influence more advisors, regardless of geography, to develop a passion to increase education employees to participate early and throughout their life, that is one of the best compliments I can ever receive.”

“Kent is an inspiring example of the 403(b) industry leaders we have as NTSA members. He delivers innovative solutions such as auto-enroll and 403(b) matching in his home markets of Minnesota, Iowa and the Dakotas and happily shares best practices with NTSA colleagues. For over 20 years, Kent has been a highly visible and available advocate for NTSA, always ready to collaborate on industry projects, write an article, host a Summit session, participate in a webcast, and, maybe most importantly, has infused his enthusiasm for NTSA with his EFS leadership team who contribute their energy across all facets of the organization,” said Jim Keller, ERPA, CPFA™, and 2019 NTSA President.

2022 BOB D. SCHILLER AWARD

KRISTINE J. COFFEY

CPC, CPFA™, CRES

CPE Associates, Ltd., Pewaukee, WI

Kris's commitment to NTSA's success and forward progress since our integration with ASPPA, and then ARA, has been spectacular. A strong moral, ethical and results-oriented compass is her guide, setting the standard for all of us.

With her vast experience and special expertise, she has brought our conference to new heights, both in-person and virtually. Her tireless work on Governance, working collaboratively with other NTSA leaders, has set the standard and process for years to come. These works enhance all the standing committees, especially Awards, Membership Engagement, and Professional Education along with Government Affairs. Having personally brought in dozens of new volunteers, Kris revels in NTSA's growing influence and leadership, proudly proclaiming its feats to ARA Leadership, Strategic Partners, and Prospects.

She has provided stellar creativity and then even implements and monitors those projects with steadfast humility, always looking for improvement. "Together We Make It" or "Onward and Upward" have been rallying messages from the "energizer bunny," and so we respond, grow, and prosper. "This honor goes to the hundreds we've worked and played with, colleagues and prospects who are now friends and mentors. I have overwhelming gratitude for the fascinating opportunities to give back in this life chapter," replied Kris.

We salute our role model, Kris Coffey, with the Bob D. Schiller Award as a well-deserved and hard-earned lifetime recognition.

ABOUT THE RICHARD FORD VOLUNTEER SERVICE AWARD

The NTSA Richard Ford Volunteer Service Award was established in 2019, NTSA's 30th anniversary. It honors the unique and lifelong volunteer efforts of Richard Ford – a lively and dedicated volunteer with and for NTSA since its founding. Ford was an extraordinary community volunteer and promoter.

To continue his legacy, the Ford Volunteer Service Award demonstrates to the retirement industry and tax-exempt and nonprofit communities, industry, and participants alike that NTSA members, through this excellence and social responsibility, enhance these unique partnerships.

The lifetime service award recognizes NTSA members' work in two key areas that Richard Ford exemplified throughout his life:

1. **VOLUNTEERISM.** NTSA standing committees and projects, through the NTSA member's donation of time and talent, in ways that are extraordinary, unique, and valuable.
2. **SERVICE.** Community Service, either locally or nationally, through the NTSA member's donation of time and talent, in ways that are significant, innovative, and meaningful.

2021–2022 RICHARD FORD VOLUNTEER SERVICE AWARD JUDGING COMMITTEE

Members of the award's Judging Committee show significant volunteerism and personal commitment to NTSA and to community service. The 2021-2022 members include:

- **CHAIR: Susan Diehl,** QPA, CPC, ERPA, BCF™; PenServ Plan Services, Inc., Horsham, PA
- **Randy Aranowitz,** CLU, TGPC, CLTC; US Kades-Margolis, Wayne, PA
- **David R. Blask,** CPC, TGPC, AIF®, CRES; 2020 Ford Volunteer Service Awardee, Lincoln Investment, Retired, Marlton, NJ
- **Michael Goldberg,** 2021 Elite Advisor, Equitable, Boca Raton, FL
- **Kevin Twohy,** PlanMember, Carpinteria, CA
- **OF ADVICE: Kristine J. Coffey,** CPC, CPFA™, CRES; CPE Associates, Ltd., Pewaukee, WI

TAMARA L. INDIANER
CFP®, AIF®, CRES
Lincoln Investment, Worcester, MA

NTSA
- Management Council
- Leadership Council
- Summit Co-Chair & Presenter
- CRES Committee Chair
- GAC & State Legislative Advocacy
- ARA At-Large Director on Board
- ARA Council for Women Diversity Committee

COMMUNITY
- Involved in Board, strategic planning, fundraising for healthcare
- Education, Healthcare, Human Rights, Neurofibromatosis Northeast
- Donations to Neurofibromatosis Northeast, Burlington, MA

TAMARA'S NTSA VOLUNTEER STORY
"NTSA has been crucial to my practice and to my professionalism. CRES has been my focus and commitment, both nationally and regionally, in addition to developing strategies and tools for other NTSA members – from virtual presentations to ads, checklists, and programs. NTSA networking made this all possible for the Northeast, collaborating with NTSA members in the Southwest. NTSA Advocacy has been influential across the country and particularly in my home state of Massachusetts. Testifying before the state legislature was meaningful and impactful, especially when we had results."

TAMARA'S COMMUNITY SERVICE STORY
"Our adopted son was diagnosed with Neurofibromatosis (NF1). The focus for me and my partner has been on raising awareness, supporting research and treatment for local and national development, and pursuing hope.

"My life is about a balance of needs: self, partner, parent, and family; religion; social justice; education; and work, industry, and clients. Volunteer service actions grow from developing values, morals, and ethics. That is exactly how my community service evolved and grew. With a deep sense of commitment, I want to use my talents to make the world better. In my youth, I tried to solve the Mideast conflict in Israel; and now, in my local area, I believe in and work at education, healthcare, and human rights. Of particular meaning is working to make a diagnosis of NF some day to be treatable or even eradicated. From our children we are taught."

ADAM PEARCE
CFP®, 2016 Elite Advisor
Retirement Professionals, Phoenix, AZ

NTSA
- Management Council
- Leadership Council
- CRES Committee
- Summit Presenter

COMMUNITY
- Involved in mentoring, leadership and fundraising
- Hustle PHX
- Donations to Hustle PHX, Phoenix, AZ

ADAM'S NTSA VOLUNTEER STORY
"What I found on my journey with NTSA is that you serve with many successful and talented folks. And successful folks tend to also be givers – generous with their time, relationships, and knowledge. As you work alongside one another, you learn a lot along the way. You share ideas. And you get a lot of help.

"It's no coincidence that the successful tend to be givers. Because when you give you also get back. I have learned you can't out-give – you always get back more. It's the law of reciprocity. If you give sparingly, you will also receive sparingly; if you give bountifully, you will reap bountifully. Finally, when others see a giver, they want to give too. By our actions, we create a culture of generosity. And together, that is what we inspire at NTSA. A great example for our industry and a better one for our country."

ADAM'S COMMUNITY SERVICE STORY
"Adam is an amazing individual who has given his time and is committed to the mission of Hustle PHX. Despite some of his health challenges, in a very trying time in his life, Adam continued to find ways to support the mission of Hustle PHX by supporting entrepreneurs in urban/inner city communities throughout Phoenix."

2021 RICHARD FORD VOLUNTEER SERVICE AWARD

KENT SCHUTTE

TGPC, CRES, CLU, ChFC, CFP®, 2018 Elite Advisor

EFS Advisors, Cambridge, MN

NTSA

- Management Council
- Leadership Council
- Elite Advisor Awards Award Judging Committee
- Summit Presenter

COMMUNITY

- Involved in COVID response planning and fundraising
- Cambridge, MN Community Foundation
- Donations to Cambridge Community Foundation

KENT'S NTSA VOLUNTEER STORY

"Increasing employee participation in non-ERISA 403(b) plans has always been, and will continue to be, my primary focus and passion. Helping employees of educational facilities become educated about retirement so they start early, save more, and plan better when they are ready is who and why I serve. Educational seminars, implementing match programs, online enrollments, and auto enrollments is how I serve."

KENT'S COMMUNITY SERVICE STORY

"In the small town of Cambridge, MN – with a population of just under 10,000 – they can sometimes struggle to keep a thriving downtown. As big box stores have moved into the outskirts, it is important to the city leaders to see how other local business leaders can help. In conjunction with local healthcare systems, banks, realtors, and other local merchants, we worked together for the benefit of all. We immediately put together a fundraising challenge and I personally challenged other businesses to match my donations. When COVID hit, there was an immediate impact on several local restaurants, clothing stores, and other merchants. We regularly bought lunches for staff from local restaurants who had carry-out to support their businesses. It is so rewarding to band together and watch the pouring out of compassion and financial support in order to keep the small businesses afloat during these unprecedented times."

2022 RICHARD FORD VOLUNTEER SERVICE AWARD

NATHAN J. GLASSEY

TGPC, QKA, CRES

National Benefit Services, Farmington, UT

NTSA

- Business Intelligence Committee Co-Chair
- CRES Committee
- Government Affairs Committee
- Professional Education Committee and TGPC Task Force

COMMUNITY

- Involved in mentoring and community engagement
- Wasatch Front Football League, FORZA Futbol Club, Utah Avalanche Soccer Club, Boy Scouts of America, Church of Jesus Christ of Latter-Day Saints
- Donations to Wasatch Front Football League

NATHAN'S NTSA VOLUNTEER STORY

"Nathan is one of those volunteers where you wonder how he has had the time to help in so many committees, let alone have time for work. In addition to the time, energy, and expertise that he brings to NTSA, Nathan's integrity is most impressive. All that he does for NTSA and the industry is done in an effort to make 403(b)s better, more credible, and more respected."

NATHAN'S COMMUNITY SERVICE STORY

"I thoroughly enjoy serving the youth in my community. They are the future, and the more prepared they are for what lies ahead, the better off they will be. In both my religious service and in coaching youth sports, I love to put all my focus on the youth and am grateful for all they teach me as I try to serve them. Watching these young people accomplish things they never thought they could accomplish brings me such great joy and encourages me for what the future holds."

2022 RICHARD FORD VOLUNTEER SERVICE AWARD

PHILIP KIM
CFP®, ChFC, CLU, RICP®, CRES
Signature Wealth Concepts, Scottsdale, AZ

NTSA
- Management Committee
- Leadership Council
- CRES Committee Chair
- Summit Presenter

COMMUNITY
- Involved in advocacy, community engagement, fundraising and support
- ACEL, Brighterway Institute
- Donations to Brighterway Institute, Phoenix, AZ

PHIL'S NTSA VOLUNTEER STORY
"Phil is an exemplary volunteer. He is creative, organized, and very committed to helping everyone succeed. His selfless leadership and contributions to various committees have resulted in significant progress for NTSA initiatives that help the entire membership."

PHIL'S COMMUNITY SERVICE STORY
"Through ACEL, I hope to inspire and motivate other Asian American colleagues in their respective pursuits. Brighterway Institute provides free dental service for the homeless in the Phoenix, AZ area. I am spearheading a fundraising golf tournament to raise money for the nonprofit while shining a spotlight on the great work that the nonprofit does, both locally and nationally."

ABOUT THE ELITE ADVISOR AWARD

These Elite Advisor Awards are by advisors, for advisors, to recognize the best of the best in terms of lifetime achievement. The focus of the award is on NTSA financial advisors' innovative, unique, profound, and successful best practices for advocacy, leadership, practice management, and legacy within the 403(b), 457(b), and ERISA nonprofit retirement industry (which directly affects the ability of American workers to build a successful retirement, especially through employer-based retirement plans).

Anonymity marks the award's judging process, with all Nominations, Applications, and Affirmations being fully redacted before the judges carefully consider, individually, the Honored Nominees' quantitative and qualitative submissions. Then together, the judges consult, collaborate, and come to a consensus, facing the hard task of anonymously choosing the best of the best through the lens of their own extensive experience, expertise, and responsibility.

2021–2022 ELITE ADVISOR AWARD JUDGING COMMITTEE

- **CHAIR: Michael A. Pollakowski,** GWN Securities, Kansas City, MO
- **VICE CHAIR: Kent Schutte,** TGPC, CRES, LUTCD, CLU, ChFC, CFP®; 2018 Elite Advisor; EFS Advisors, Cambridge, MN
- **Jody Detillier,** ChFC, RICP®, TGPC, CLTC, LUTCF, CPFA™, CRES; 2015 Elite Advisor; Detillier Financial Advisors, Lutcher, LA
- **Wat Keys,** CFP®, CRPS, CRES; 2019 Elite Advisor; CAPTRUST, Raleigh, NC
- **Randal Lupi,** 2019 Elite Advisor; Equitable, Cleveland, OH
- **Robert Young,** CRES; 2020 Elite Advisor; One2One Wealth Strategies, LLC, Scottsdale, AZ
- **OF ADVICE: Kristine J. Coffey,** CPC, CPFA™, CRES; CPE Associates, Ltd., Pewaukee, WI

MICHAEL GOLDBERG

CRES
Equitable,
Boca Raton, FL

BROKER-DEALER: Equitable
RETIREMENT ASSETS UNDER ADVISEMENT: $46M
PARTICIPANTS SERVED: 5100
SCHOOL DISTRICTS SERVED: 6

Michael's "… goal as a leader is to model the right way to work in the employer space, show them the professionalism needed to succeed, and always show them the 'why' in what we do. The culture of our organization has always been: if you do the right things for others, you will do well yourself.

"Michael has dedicated his time outside of the office to be an advocate for students and teachers, partnering with the Academy of Finance and local school districts to offer mock interview classes, 'Shark Tank' competitions, and public speaking courses.

"He can often be found sponsoring Career Day, Math Bowl, and Family Fun Night or chaperoning school field trips or proctoring state exams. He also sits on the board of School Advisory Committees (SAC) offering his voice to superintendents, teachers, parents, and community partners. During the pandemic, Michael and his branch quickly delivered hand sanitizer, masks, meals, school supplies, and other necessities to schools and teachers, thereby making sure he was there with a helping hand during trying times."

SHANE ROBINSON

Robinson and Associates,
Greenville, NC

BROKER-DEALER: Lincoln Investment
RETIREMENT ASSETS UNDER ADVISEMENT: $180M
PARTICIPANTS SERVED: 1950
SCHOOL DISTRICTS SERVED: 6

Over the past decade and a half, Shane has grown his family practice from 3 advisors to 12. Their business model grew from offering only insurance products to offering not only full financial planning for most clients but also full estate planning for any client who needs a Will, Trust, or Power of Attorney. Plus, they addressed diversifying from exclusively 403(b) to a combination 403(b)/457(b) and increased participation rates in these accounts up to 50 percent.

"We have always instilled these core principles among our new advisors:

- Try to be the total advisor for each client you work with – handle their retirement, insurance, and after-tax investments, and be their go-to financial professional.
- Pace yourself. This business is known for burnout. Try not to have more than 8-9 meetings per week and plan to spend 2 hours with each new client. Take time to understand their goals and objectives, listen to their needs and wants, and educate them based on that conversation. These are our core building blocks for creating lifelong relationships.
- Have fun – it's a business that changes with each client you see. Know your job, know your product, but know everyone else's product as well. Be able to explain everything, not just what you offer.
- Be consistent and have a process in place."

2021 ELITE ADVISOR AWARD

LISA TURSI

AIF®, CRES

Lincoln Investment, Worcester, MA

BROKER-DEALER: Lincoln Investment
RETIREMENT ASSETS UNDER ADVISEMENT: $75M
PARTICIPANTS SERVED: 900+
SCHOOL DISTRICTS SERVED: 74

For more than 26 years, Lisa Tursi has been a well-respected financial advisor. She began her career working in the K-14 marketplace and serviced 403(b) plans. However, over the years she has evolved her work into a full financial planning practice with a dedicated support team. Lisa is passionate about financial planning and most importantly, keeps pace with the evolving standards, laws, products, and practices in the financial and investment worlds.

"I continue to be a resource for the 403(b)/457(b) marketplace, providing education through innovative and creative ways. By advising key members of school departments and city employees, I continue to strengthen their knowledge about the importance of 403(b)/457(b) and provide hands-on training and support. I am honored to be asked every year to speak at new-hire meetings and employee professional-development days for the public school departments in several states. Our educators play such an influential role in our community and yet they have little access or time to gather valuable information about the unique options they have for retirement planning."

"She has been a strong advocate in the 403(b)/457(b) marketplace in MA when MA tried to go to a single automatic enrollment vendor for 457(b)s and the new MA fiduciary rule. She has strong leadership skills and has been instrumental in MA lobbying and advocating."

2022 HONORED NOMINEES FOR THE ELITE ADVISOR AWARD

- **Alberto E. Gaglianese, CFP®, AIF®, CRES**
  Clearpath Wealth Partners, LLC, Marlton, NJ
- **Carla-Ann E. Goedtke, CPFA™, CRES**
  Investors Choice Financial Services, Slayton, MN
- **Virginia T. Harriett, CFP®, CRES**
  Harriett Financial Group, Medford, NJ
- **Michael LaMonda**
  Overlook Private Client Group, West Hurley, NY
- **Mitch Melan**
  Melan Financial, Dunwood, GA
- **Jennifer Prosise, CFP®, CRES**
  The Voyager Group, Ltd., Joliet, IL
- **Rian A. Steinbiss, AIF®, CRES**
  Clearpath Wealth Partners, LLC, Marlton, NJ

ALBERTO GAGLIANESE

CFP®, AIF®, CRES
Clearpath Wealth Partners, LLC, Marlton, NJ

BROKER DEALER: Lincoln Investment
RETIREMENT ASSETS UNDER ADVISEMENT: $193,380,000
PARTICIPANTS SERVED: 1401
SCHOOL DISTRICTS SERVED: 12

"I attempt to lead by example. I never ask the junior agents that I have mentored to do anything that I am not doing myself. By shadowing me, they are able to see what I have done on a day-to-day basis over my years in the business and implement my practices in a way that works for them. Through this strategy, I have successfully helped transition several interns into junior advisors within my practice," says Gaglianese. "Through empowering my team, I have maintained long-term employees. I have built an exceptional team around me that enhances my strengths and offsets my weaknesses, which has not only helped build a successful business but has allowed me to spend more time on the aspects of the work I truly enjoy."

Gaglianese values community engagement as part of the essential core of being a financial advisor. "I consider servicing my school districts more than just signing up new clients… I encourage members of the communities I service to approach me with any new events or charities that are upcoming to ensure that my involvement never falters… establishing myself as part of the community has allowed me to build trust and forge strong relationships, which resulted in many new client referrals for my practice."

2022 ELITE ADVISORS

CARLA-ANN E. GOEDTKE

CPFA™, CRES
Investors Choice Financial Services, Slayton, MN

BROKER DEALER: American Portfolios Financial Services
RETIREMENT ASSETS UNDER ADVISEMENT: $218M
PARTICIPANTS SERVED: 1500
SCHOOL DISTRICTS SERVED: 30

For 25 years, CarlaAnn Goedtke has been utilizing her financial planning expertise in the retirement market in Slayton, Minnesota. While her practice is in a rural area, "our practice evolved from client data on index cards to integrating multiple pieces of technology to provide clients with the best service possible… Providing education to clients evolved from Community Ed programs to a full calendar of web meetings." She serves as the private sector representative for Murray County on the SW Minnesota Workforce Council and is the current Vice Chair.

Goedtke believes in investing in the future of the industry. "We have many client families that we work with up to four generations. With those families, we have been part of their legacy story and want our younger clients to be able to learn and pass this down to the next generations."

"One of our offices is in a college town, and we enjoy hosting an intern from the business or communications department each year. It is a joy to watch them learn about 'all things financial,' even if they are not going to go into this field. It's an even greater joy when they come back and thank us for the values that they learned while working with us."

VIRGINIA T. HARRIETT
CFP®, CRES
Harriet Financial Group, Medford, NJ

BROKER DEALER: Lincoln Investment
RETIREMENT ASSETS UNDER ADVISEMENT: $287,700,000
PARTICIPANTS SERVED: 1700
SCHOOL DISTRICTS SERVED: 10

Constant industry engagement has defined Harriett's career. "I have had an extremely rewarding career, knowing I helped many people save more for their family's future, helping them through life's transitions, improving their retirement lifestyles, achieving their goals, and giving them peace of mind around their finances. I have always tried to be a good listener, lending an empathetic ear during our meetings. I take a collaborative approach when working with clients. I have been a lifetime student of improving the client experience, reading lots of industry books and trying different processes until I found one that works, and joining networking groups and sharing information with my colleagues."

In addition to focusing on industry engagement, Harriett has an eye to the future. "I have welcomed four new junior advisors into my practice over the years, mentoring them, sharing knowledge and clients with them, and training them to become independent advisors. A few years ago, I hired a recent college graduate as a part-time office support person. She grew into a top notch sales assistant and just completed the paraplanner course. We are in the process of looking for her replacement so she can be promoted to become my paraplanner, so we can develop a new offering for our practice: Holistic Financial Planning."

2020 RICHARD FORD VOLUNTEER SERVICE AWARDS
- **David Blask**, Lincoln Investment, Palm Beach, FL
- **Donna Caloia**, Lincoln Investment, Palm Beach, FL
- **Lisa Stubbs, CRES**, Security Benefit, Topeka, KS

2020 ELITE ADVISORS
- **Joseph Avallone**, PlanMember, Winter Springs, FL
- **Sara E. McGrath, AIF®, CRES**, Lincoln Investment, Worcester, MA
- **David Wolfe, CRES**, EFS Advisors, Cedar Rapids, MN

2019 ELITE ADVISORS
- **Gary Immink**, PlanMember, Grandville, MI
- **Wat Keys, CFP®, CRPS**, CapTrust, Raleigh, NC
- **Randal Lupi, RPS**, Equitable, Novelty, OH
- **Robert Young, CRES**, PlanMember, Glendale, AZ

2018 ELITE ADVISORS
- **Shane Hall, RFC**, Shane Hall Financial, Amarillo, TX
- **Kent Schutte, CFP®, ChFC, CLUTGPC, CRES**, EFS Advisors, Cambridge, MN
- **Christina Winters Gears, AIF®**, Lincoln Investment, Irving, TX

2017 ELITE ADVISORS
- **Michael Cayen, CRC®**, M3 Investment, Royal Oak, MI
- **Scott Hayes, CFP®, TGPC, CPFA™**, ISC Group, Inc., Dallas TX
- **Chad Hufford**, Veritas Wealth Management, Anchorage, AK
- **Stewart Jacobson, JD, CFP®**, Lincoln Investment, Sugar Land, TX

Note: *The NTSA Awards Committee, which oversees all NTSA Awards, is chaired by Kristine J. Coffey with Michael J. O'Neill as Vice Chair.*

2016 ELITE ADVISORS

- **Martin Arinaga, CFC, CFP®**, Chinen & Arinaga Financial, Mililani, HI
- **Jaclyn Bell**, Lincoln Investment, Sugar Land, TX
- **Joshua R. Decker, CFP®**, EFS Advisors, St. Paul, MN
- **Thomas Hall**, Tax Sheltered Planning, Fayetteville, NC
- **Philip Kim, CFP®, ChFC, RICP, CRES**, Equitable, Scottsdale, AZ
- **Adam Pearce, CFP®, CRES**, Lincoln Investment, Phoenix, AZ

2015 ELITE ADVISORS

- **Kathryn Cawley**, The Voyager Group, Ltc., Joliet, IL
- **Louis Deppas**, Lincoln Investment, Lakewood, NY
- **Jody Detillier, ChFC, RICP, TGPC, LUTCFR, CLTC, CPFA™, CRES**, Lincoln Investment, New Orleans, LA
- **Lyle Uyeda**, Chinen & Arinaga Financial, Mililani, HI
- **Richard E. Williams, CRC®**, PlanMember, Grandville, MI

2014 ELITE ADVISORS

- **S. Bruce Allen**, Old Dominion, Winchester, VA
- **Randy E. Aranowitz, CLU TGPC, CLTC**, US Kades-Margolis, Wayne, PA
- **Charles "Sonny" Detillier**, Lincoln Investment, Lutcher, LA
- **Richard Dobson**, American Financial Management, Ltd., Cedar Falls, IA
- **Frank R. Owen, III, CLU, ChFC**, F.R. Owen and Associates, Charlotte, NC
- **Bruce Smith**, CalPro Network, San Diego, CA
- **Jeffrey J. Smith** (d), Lincoln Investment, Lombard, IL
- **Jill Snyder, TGPC**, National Insurance, Brookfield, WI

NTSA 2022 STRATEGIC PARTNERS

NTSA
STRATEGIC PARTNERS

NTSA expresses its gratitude to its Strategic Partners, whose support is key to the accomplishment of our mission and to serving our members, our industry and ultimately the plan participants and their dependents and beneficiaries.

ADMINPARTNERS
nbs national benefit services.
AMERICAN FIDELITY a different opinion
National Life Group® Experience Life®
ASPIRE Powered by PCS Retirement
OFG FINANCIAL SERVICES, INC. SPECIALIZING IN RETIREMENT AND INVESTMENT PLANNING MEMBER FINRA/SIPC
EFS® ADVISORS
US OMNI
EQUITABLE
PENSERV PLAN SERVICES
GWN Securities, Inc.
PlanMember
Horace Mann
US Retirement Partners
Invesco
Security Benefit® TO AND THROUGH RETIREMENT
US Kades-Margolis
TSA CONSULTING GROUP
LINCOLN INVESTMENT

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