



Media Contact:

Katie Hinkfuss
The Lowe Group

Katie.hinkfuss@lowecom.com

(414) 376-7638

Media Contact:

Theresa Claire

Jackson, Grant Investment Advisers, Inc.

Theresa@juliejason.com

203-322-1198

401(k) Champion® Award Announces Winners

Only award of its kind given to individuals who demonstrate the importance of retirement saving

STAMFORD, Conn., Apr. 28, 2020 – Winners were announced today for the second annual 401(k) Champion® Award, honoring individuals who advocate for the importance of retirement saving and help co-workers excel as 401(k) participants in good markets and bad. Sponsored by Jackson, Grant Investment Advisers, Inc. and the firm’s founder, Julie Jason, \$1,000 prizes were awarded to three standout 401(k) participants who competed for the coveted title of 401(k) Champion.®

Congratulations to this year’s 401(k) Champions®:

- Bari Scheinbach, Movéo (Chicago, IL)
- Laura Dobbins, Magellan Health (Sacramento, CA)
- Steven Dibble, Stratford Schools (San Jose, CA)

“A 401(k) Champion® leads by example,” said Jason. “This year’s winners demonstrated that they understood the wisdom of starting early, keeping an eye on a long-term goal of retirement security, staying the course even in disruptive markets such as these, and avoiding the temptation to halt contributions during market declines – a time when payroll deductions ‘buy’ more of an investment at discount prices.” 401(k) Champions® can deliver peer-to-peer messages that are far more powerful than reading a brochure, attending an employee enrollment session or trying to navigate an online tool.

Apply for the 2021 401(k) Champion® Award

Information on the third annual 2021 401(k) Champion® Award will be updated on the award [website](#) in September. The contest is open to 401(k) participants age 21 and older.



Plan sponsors are encouraged to share information about the award with their employees. “It is important to have an advocate who can serve as an important internal resource for other team members to demonstrate the beneficial steps you can take early in your career to meet long term financial retirement goals,” said Sheri Granholm SVP, Consulting & Engagement at Movéo.

About the 401(k) Champion® Award

“Our motivation for creating 401(k) Champions® was to shine a light on 401(k) participants who not only benefit from saving through their 401(k)s but could also explain the benefits to their peers, including the importance of sticking to a plan,” said Jason.

This year’s applications were reviewed anonymously by four independent judges, who noted that they were impressed with the candidate pool’s knowledge of 401(k)s and investment concepts. Three 2020 401(k) Champions® received cash awards of \$1,000 each based on an essay submitted online and an interview.

The 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. If you were to be named as a 401(k) Champion® what would you be willing to do to inspire non-participants to participate in the 401(k)?

About the sponsors

The 401(k) Champion® Award is the initiative of long-time financial literacy proponent, Julie Jason, JD, LL.M., and her firm, Jackson, Grant Investment Advisers, Inc. (Stamford, Conn.). Jason, the firm’s founder, got her start on Wall Street as an attorney. Jackson, Grant is an independent 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

Jason’s interest in financial literacy education is reflected in her vast body of written work. Over the years, she has written over 1,000 weekly columns, numerous articles, and seven books, starting with *You and Your 401(k)* (1996) and *The 401(k) Handbook* (1997), to her most recent books, *The Retirement Survival Guide* (2009/2017), *Managing Retirement Wealth* (2011/2017), and *Retire Securely* (2018). Her work has been recognized for excellence in financial literacy education (the EIFLE Award) and clear, concise, communication (the CLARION Award). Her weekly column is syndicated nationally by Andrews McMeel Universal. www.juliejason.com

###