

Spectrum Investment Advisors Receives Two National Leadership Nominations
PLANSPONSOR Retirement Plan Advisor Team of the Year and
NAPA 401(k) Advisor Leadership Award

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March, 2015-(Mequon, WI) Spectrum Investment Advisors is pleased to announce that national publication PLANSPONSOR has nominated their company for “**2015 Retirement Plan Adviser Team of the Year**” for the second year in a row. PLANSPONSOR reviewed over 40 companies each in the advisor and advisor team categories nationally and selected nine finalists. Spectrum has also been nominated for “**The National Association of Plan Advisors (NAPA) 2015 401(k) Advisor Leadership Award.**” Now in its eight year, the prestigious NAPA 401 (k) Advisor Leadership Award recognizes leadership, innovation and contributions to the retirement plan industry with sales, marketing and establishment of 401(k) plans.

Spectrum is the only financial advisor in the Midwest to be nominated for two awards by two national organizations. Both leadership awards are reviewed and judged by a jury of their peers.

PLANSPONSOR finalists are selected based on a number of factors. PLANSPONSOR reviews services the advisor offers, how they benchmark plans, the education they offer plan participants, whether they consider retirement readiness and income replacement ratios, if they provide 3(21) or 3(28) fiduciary services, how often they review investments and service providers and whether they offer guidance to plan participants or sit on plan investment and retirement committees.

On Tuesday, March 31, 2015 Jim Marshall, President, and partners Cheryl Luedtke-Stoehr, and Manuel Rosado will attend the Awards for Excellence Dinner. The Awards for Excellence is an annual networking event that celebrates the accomplishments of recognized leaders in the retirement plan industry. Each year at an exclusive gathering they honor the nation’s leading retirement plan sponsors and advisers, as well as the top product, investment and service providers. This year, Global Editor-in-Chief Alison Cooke Mintzer will host the dinner and recognize each nominee in New York City at the beautiful Pier 60 in the Chelsea Pier complex, overlooking the Hudson River.

NAPA’s 10 finalists were selected from a field of 100 participants and semi-finalists were selected based on the following factors. Acknowledgement of peers and customers, demonstrated expertise in plan design innovations or products, results in terms of plan growth or participant retirement readiness, participation and leadership in industry events and committees, expertise sought by peers, regulators and policy makers.

Finalists will be acknowledged at the 2015 NAPA 401(k) summit on March 22-24 in San Diego, CA where the winner will be announced. Jim Marshall, President and partners Cheryl Luedtke-Stoehr, and Matt Demet will attend.

For more information on Spectrum Investment Advisors, please visit www.spectruminvestor.com or contact President Jim Marshall at 262-238-4010 or jfmarshall@spectruminvestor.com.

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