

Financial Literacy Proponent Julie Jason and her firm, Jackson, Grant Investment Advisers, Announce Winners of the Inaugural 2019 401(k) Champion Award Recognizing 401(k) Participants Who Love Their 401(k)s

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Jackson, Grant Investment Advisers, Inc. →

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STAMFORD, Conn., April 29, 2019 /PRNewswire/ -- In conjunction with Financial Literacy Month, financial literacy proponent, Julie Jason of Greenwich, Conn., and her firm, Jackson, Grant Investment Advisers, Inc. of Stamford, Conn., announce and congratulate four winners of the inaugural 2019 401(k) Champion Award and five honorable mentions.

The 401(k) Champion Award is the first award to recognize 401(k) participants who are masters of their 401(k)s.



(PRNewsfoto/Jackson, Grant Investment Advis)

The purpose of the award is to find and shine a light on employees who believe in their 401(k)s.

"A 401(k) Champion leads by example," said Julie Jason. "He or she is committed to act now to secure a retirement someday in the future."

The search for Champions was conducted through an online questionnaire asking: "If you were to advise co-workers about why they should contribute to (and/or maximize) their 401(k)s, what would you say?"

Four independent judges reviewed anonymized applications for persuasiveness in explaining the importance of employee participation in the 401(k); conveying the applicant's appreciation of the value of the 401(k) as a retirement tool; and clarity and demonstration of overall knowledge of 401(k) plans. Applications were broken into three age categories, 18-34, 35-54, and 55 and older. Four winners were chosen due to a tie in the 18-34 category.

A judge, Manny Bernardo (retired), Former Director of Employee Benefits Tax Services for Deloitte & Touche Tristate, Benefits Specialist Attorney, and Human Resources Benefits Executive, said: "I was pleasantly surprised to see employee participants who understood how a 401(k) plan works and who appreciated the real financial benefits of participation in a 401(k) plan and even encouraged fellow employees to participate."

The 2019 401(k) Champions (\$1,000 prizes) are:

1. Alondra Carbajal of Pacific BMW (Los Angeles, CA)
2. Conor O'Neill of Academies of Math and Science (Tucson, AZ)
3. Alison Sowell of Applied Materials (Santa Clara, CA)
4. Kenneth Warren (retired) of W.E. Aubuchon, Co, Inc. (Allentown, NH)

The 2019 Champion Honorable Mentions (\$250 prizes) are:

1. Kristina Duarte formerly of Jaros Baum & Bolles (New York, NY)
2. Patricia Hayes of SAC, Inc (Millburn, NJ)
3. Karen Murano of Regional School District 16 (Prospect, Conn.)
4. Jean Orr of The Boeing Company (Thousand Oaks, CA)
5. Andrew Violette of KMC Systems (Merrimack, NH)

"We are delighted to have located these 401(k) Champions through this essay contest," said Jason. "They have demonstrated an understanding of the benefits of their 401(k)s and are equipped to share their enthusiasm with their peers." A nationwide search for next year's Champions will begin on 401(k)/403(b) Day (Sept. 6, 2019).

2019 winning essays are posted at www.juliejason.com/award

Future 401(k) Champions

The sponsors are committed to finding and recognizing future 401(k) Champions and invite employers and associations to reach out to them to participate in future awards. Contact Theresa Robbins by phone (203-322-1198) or email (theresa@juliejason.com).

About the sponsors

The award is the initiative of financial literacy proponent, Julie Jason, and her firm, Jackson, Grant Investment Advisers, Inc. (Stamford, Conn.).

Jackson, Grant Investment Advisers, Inc. is an independently owned fiduciary boutique with two missions: 1) serving high net worth families (\$5 million minimum) and 2) promoting financial literacy education to all. Located in Stamford, Conn., the firm is registered with the SEC as an investment adviser. www.jacksongrant.us Tel: 203-322-1198

Founder, Julie Jason, JD, LL.M., got her start on Wall Street as a lawyer. Through her award-winning columns, books and posts, she shares insights gained from 30 years in money management and law. She writes for audiences of every financial means, promoting investor education and investor protection through her column (syndicated by King Features), Forbes.com posts, and her books. www.juliejason.com

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