



Top
Financial
Advisers
2018

Jason Navarro Named to 2018 Financial Times 401 Top Retirement Advisers

September 27, 2018 – Jason Navarro is pleased to announce that he has been named to the 2018 edition of the Financial Times 401 Top Retirement Advisers. The list recognizes the top financial advisers who specialize in serving defined contribution (DC) retirement plans, such as 401(k) and 403(b) plans, across the US.

This is the fourth annual FT 401 list, produced independently by the *Financial Times* in collaboration with Ignites Research, a subsidiary of the FT that provides business intelligence on the asset management industry.

Financial advisers from across the US applied for consideration, having met a set minimum of requirements. The applicants were then graded on seven criteria: DC assets under management; DC plan participation rate; DC plan growth rate; specialization in DC plans; years of experience; advanced industry credentials; and compliance record. There are no fees or other considerations required of advisers who apply for the FT 401.

The final FT 401 represents an impressive cohort of elite advisers: the “average” adviser in this year’s FT 401 has 20 years of experience advising DC plans and advises \$1.26 billion in DC plan assets. The FT 401 advisers hail from 38 states and Washington, D.C., and DC plans on average account for 81% of their practices’ total assets.

The FT 401 is one in a series of rankings of top advisers developed by the FT in partnership with Ignites Research, including the FT 300 (independent RIA firms) and the FT 400 (broker-dealer advisers).