

Congratulations Moreton Retirement Partners

planadviser's
TOP100
RETIREMENT PLAN ADVISERS

“For the past several years, we have drawn from the pool of nominations for *PLANSPONSORS*’s Retirement Plan Adviser and Adviser Team of the Year a list of “most successful advisers.” These are advisers whose practices stand out in terms of a series of quantitative measures. This year, we have refined that approach to compile a list of *PLANADVISER*’s Top 100 Advisers and Adviser Teams.

We highlight the quantitative standouts, in terms of dollar value of qualified plan assets under advisement as well as number of plans, and we also draw attention to those who have a demonstrable presence, defined as having more than a tenth of their practice focused on 403(b) plans, defined benefit plans, nonqualified plans, or 457 plans. This year’s Top 100 comprises 36 advisers and 64 adviser teams.

Just how successful are these TOP 100 Advisers? Collectively, the individual advisers represent about \$17 billion in retirement plan assets, while the teams on the list collectively serve more than \$115 billion in plan assets.

Skilled retirement plan advisers have been indispensable resources to their plan sponsor clients. Size isn’t everything, of course-but it is an objective measure of success, and one well worth acknowledging.” --PA

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Congratulations to Moreton Retirement Partners for being recognized in the following categories:

Teams with \$800 and More in AUA

>\$1.5B to \$2B

Teams with 75 or More Plans 81-100

Specialty Focus

10% or more in 403(b) Plans

Specialty Focus

10% or more in 457 Plans

Specialty Focus

10% or more in defined benefit Plans



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Securities offered through LPL Financial. Member FINRA & SIPC. Investment Advice offered through Independent Financial Partners, a registered investment advisor and separate entity from LPL Financial. Nominations were solicited online from retirement plan advisers, their employers and/or broker/dealers, plan sponsors, investment vendors, accountants and attorneys, and pension administrators. Advisors who have attained the PLANSPONSOR Retirement Professional (PRP) designation receive an automatic nomination. To enter the awards process, nominees must complete a form providing various details of their practice, including the details displayed here. The list is based solely on quantitative factors, while the PLANSPONSOR Retirement Plan Adviser award considers both qualitative and quantitative factors, including factors not considered in determining the most successful lists. Client feedback may not represent the views of all clients. This is not indicative of the wealth manager’s future performance. For more information visit www.plansponsor.com.