

Plan Adviser of the Year

Chad J. Larsen

*Moreton Financial Solutions, LLC
a member firm of National Retirement Partners*



Winning is everything when you help others plan for a secure retirement.

With every new client, new enrollment, and each increased participation rate, Chad J. Larsen and his team are winning the battle to help secure individual financial futures by helping plan sponsors and plan participants with every aspect of their retirement program.

Chad J. Larsen, PRP, AIF®, Senior Vice President
Corey Whitehead, Assistant Vice President
Megan Lewis, Account Administrator

Chad and his team serve all types of defined contribution plans, including 401(k), 403(b), 457, as well as defined benefit plans. They are personally helping as many plan participants as possible demystify the complexities of retirement plans and increase their net worth by properly saving for retirement. Chad also serves as a valuable resource to plan sponsors—helping them with every aspect of their retirement program and keeping plan sponsors from making critical mistakes with his unique hands-on approach.

Each year PLANSPONSOR's Retirement Plan Adviser of the Year recognizes "the contributions of the nation's best financial advisers—and adviser teams—in helping make retirement security a reality for workers across the nation." Criteria for the Plan Adviser of the Year includes increased participation, enhanced rates of participant deferrals, improved asset allocations, reduced fees, and expanded service levels. Chad was selected from nearly 300 nominees across the nation.

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