



**Fiduciary Benchmarks**  
Independent | Comprehensive | Informative

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# PRESS RELEASE

**Lake Oswego, OR May 30, 2017:** Fiduciary Benchmarks (FBI), the industry's leading independent retirement plan benchmarking firm, announced today a series of growth-focused changes within the organization's Client Services, Marketing and Technology teams. This expansion comes as a result of the firm's continued growth in plan benchmarking and its expansion into a new space with a suite of IRA offerings including; rollover best interest determination, IRA benchmarking and Fiduciary Rule compliance workflows.

## **The Departmental Growth and Key Additions are as Follows:**

### **Client Services**

Fiduciary Benchmarks is expanding their Broker/Dealer and Advisor Service Team by 50 percent to support increased volumes. This frontline role is critical to providing the high quality service level that Broker/Dealers, and Advisor/Consultants require and in building and maintaining our client relationships.

To ensure an exceptional client experience, Ivana Polonijo has been brought on as Vice President, Client Success. In this new role, Ms. Polonijo will refine and improve the integrated client experience which will leverage best practices for client onboarding and engagement. Prior to joining Fiduciary Benchmarks, Ms. Polonijo led a Retirement Services team at M Financial and was responsible for a qualified plan line of business representing over \$20B in assets under the advisement of more than 60 independent financial advisor firms. Her strategic consulting services focused on retirement plan sales, practice and product solutions, and management of Service Provider relationships.

### **Marketing**

Maura Gilson has been named Vice President, Marketing for the firm. Ms. Gilson is responsible for developing and implementing the marketing strategy intended to grow the brand in both the Defined Contribution and IRA spaces, while increasing engagement and client conversion. Ms. Gilson's background includes both financial and technology marketing experience. Prior to joining Fiduciary Benchmarks, Ms. Gilson worked for Prudential Annuities, where she was a Series 6-licensed, Senior Marketing Management Specialist. Her diverse background includes marketing roles at UnitedHealth Group, Gartner and Save the Children.

## Technology

The Fiduciary Benchmarks Technology team has doubled in size during the last six months to support new product innovation and technology development for both the Plan and IRA marketplaces.

*“Growth in good ideas leads to growth in revenue, which leads to growth in good and talented people to execute those ideas. We are proud to add such talented individuals as Ivana and Maura to our team as we continue to help our clients use our services to protect plan sponsors, improve outcomes for participants and ensure their fees are reasonable”* stated Tom Kmak, CEO of Fiduciary Benchmarks.

In addition, there is an open position for a Developer in Lake Oswego, OR and an Advisor Sales & Service Specialist in Southbury, CT.

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**About Fiduciary Benchmarks:** Fiduciary Benchmarks is the industry leader for independent, comprehensive, informative and cost-effective benchmarking services for the defined contribution space and has leveraged its existing patented method and technology to bring a robust and easy-to-use solution to the IRA marketplace. Founded in 2007, the company now works with many of the industry’s largest and most respected recordkeepers, Broker/Dealers, advisor/consultants and plan sponsors.

Learn more at [www.fiduciarybenchmarks.com](http://www.fiduciarybenchmarks.com)

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