



Fiduciary Benchmarks

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PRESS RELEASE

Fiduciary Benchmarks expands executive team to support growth and new product lines

Lake Oswego, OR April 21, 2020: Fiduciary Benchmarks (FBI) announced today the expansion of its leadership team appointing two executives to newly created roles supporting the firm's growth and new product lines. Mike Narkoff joins the team as Senior Vice President of Institutional Business Development and Kathleen Connelly joins as Senior Vice President of Institutional Client Development. They will report to CEO Tom Kmak.

Narkoff will be responsible for leading FBI's sales efforts working with prospective institutional clients. Connelly will focus on expanding recordkeeping relationships and work closely with Kmak to introduce new opportunities leveraging data to deliver efficiencies and enhanced decision-making and insights.

They join Kmak's leadership team including Craig Rosenthal, Senior Vice President Sales, Service and Marketing, and Matt Golda, Senior Vice President Technology and Operations. "We are continuing to invest in people, process and technology," said Kmak. "Our vision to deliver independent and comprehensive insight is unchanged but our newest tools make these services more actionable with the delivery of the Business Management Dashboard which incorporates workflow, sales tools, compliance oversight and much more."

"As a prior FBI client, I saw the power of using the independent and comprehensive benchmarking tool to win new business. The tools allow you to put fees in context, and discuss quality and value simultaneously," said Narkoff. "The newer products give institutions even more ways to grow their businesses efficiently in a competitive climate." Previously, Mike was Head of Institutional Sales at Ascensus. Over a thirty-year career, he also held senior leadership roles in Advisor Plan Sales and Institutional Relationship Management.

"FBI is uniquely positioned to help recordkeepers protect their plan sponsors and improve outcomes for their participants, which of course enhances the value they deliver to their clients. More than ever, firms want access to current, accurate data and insights to facilitate timely conversations with their clients," said Connelly. Her thirty-five years of experience includes executive roles at Financial Finesse enterprise, Ascensus, JP Morgan and T. Rowe Price.

About Fiduciary Benchmarks: Fiduciary Benchmarks is the industry leader for independent, comprehensive and informative value and fee benchmarking services for the defined contribution space. FBI also offers the Business Management Dashboard – a next generation practice management platform for retirement plan advisors enabling them to manage their business more efficiently and effectively than ever before. In addition, FBI offers IRA services including a Best Interest Determination tool. 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

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