



## PRESS RELEASE

For Immediate Release

**Westfield, NJ, March 22, 2023** – Rita Riccardi, Director of Retirement Plans, announced today that Fiduciary Plan Partners has been named one of the Nation's Top DC Advisor Teams by The National Association of Plan Advisors (NAPA). “We are honored to receive national recognition for the work we do assisting our clients to meet their organizational objectives and for plan participants to reach their retirement goals. I am thrilled that our team's commitment and dedication to servicing our clients has been acknowledged again this year. This is the third year in a row that Fiduciary Plan Partners has been named one of the Nation's Top DC Advisor Team.” said Rita.

Fiduciary Plan Partners is an independent retirement plan consulting firm made up of a team of experienced professionals dedicated to delivering quality retirement plan solutions for plan sponsors. Fiduciary Plan Partners has over \$1 Billion in assets under advisement and works with over 100 plan sponsor clients and 30,000 employees. Steven Puckett, Managing Partner, stated “I am proud of the tremendous strides that Fiduciary Plan Partners' team members have taken over the last 6 years to help organizations and their employees achieve a successful retirement”. Fiduciary Plan Partners offers a full complement of retirement plan design and fiduciary plan services including investment oversight, plan benchmarking and participant financial wellness.

Despite the market turmoil in 2022, the record number (362) of teams on this year's list continue to guide nearly \$2 trillion in defined contribution plan assets belonging to more than 56,000 plans covering more than 23 million participants. Moreover, each team listed—and to be here they are all in a single physical location—has more than \$100 million in AUA, based on self-reported assets under advisement as of Dec. 31, 2022

Unlike other lists, this focuses on individual firms, or what may, in a wirehouse environment, be referred to as a team, or office, and the assets under advisement related to their defined contribution (DC) practice, specifically in a single physical location.

Since their inception, NAPA's various industry lists have been a valuable Who's Who of who matters in the world of retirement plans and retirement plan advisors. This chapter—the NAPA Top DC Advisor Teams with AUA Over \$100 Million, ranked by self-reported DC assets under advisement—presents a compelling case for the impact on the nation's private retirement system. This list is available online at <https://www.napa-net.org/top-dc-advisor-teams-2022>

[NAPA Top DC Advisor Team Criteria](#)

**Fiduciary Plan Partners**  
**900 South Avenue West | Westfield, NJ 07090**  
**833-FPP-401K**  
[info@fiduciarypp.com](mailto:info@fiduciarypp.com)

The National Association of Plan Advisors is a non-profit professional society. The materials contained herein are intended for instruction only and are not a substitute for professional advice. COPYRIGHT 2023 BY NAPA.

This email and any attachments are solely for the use of the intended recipient (or an authorized agent of the intended recipient) and contain general information that may not be suitable for everyone. This communication may contain information that is proprietary, privileged, confidential or otherwise legally exempt from disclosure. If you have received this email by mistake, you are not authorized to read, print, retain copy or disseminate it or any attachment. Please notify the sender by reply email and delete this message and any attachments from your computer system. Fiduciary Plan Partners is an SEC registered investment adviser with its principal place of business in the State of New Jersey. Registration does not imply a certain level of skill or training.