

Benefits industry newsmakers: BerniePortal, CommonBond, MassMutual, Prudential

News from AM Best, CWHP, Corporate Insight, Four Twenty Seven, Hand Benefits & Trust, Hodges-Mace, and more.

By **C.J. Marwitz** | January 29, 2019 at 08:45 AM



Employee benefits

newsmakers ADP, SmartDollar, Wellbeats, Wagner Law Group, NTSA, Pentegra, Paladina Health, OneAmerica, and more. (Photo: Shutterstock)

Good news about employee benefits new hires, mergers, award winners, promotions, and more. Here's what crossed our desk:

[Wellbeats](#) announced **Mark Kingsriter** as company fitness director. Kingsriter, an instructor with the virtual, on-demand fitness company since 2013, will guide its overall fitness philosophy.

[The Wagner Law Group](#) announced that attorney **Israel (Izzy) Goldowitz** has joined its Washington, D.C. office as a Partner. While Chief Counsel for the Pension Benefit Guaranty Corporation (PBGC), Goldowitz led the legal teams that helped save the pensions of such companies as Chrysler and American Airlines.

The City of Santa Ana (California) and the **Ohio Association of Professional Fire Fighters** have both selected [Prudential Retirement](#), a business unit of Prudential Financial, as recordkeeper for their public sector retirement plans. For the City of Santa Ana, Prudential will oversee \$110.4 million in assets under management, covering 1,171 participants as of October 1, 2018. For the Ohio Association of Professional Fire Fighters, Prudential will oversee \$100 million in retirement assets, covering 2,633 participants as of December 31, 2018. Ron Palanca of LPL Financial is the advisor of the plan, which transitioned in December 2018.

[Pentegra](#) announced that **Vishi Jones** has been promoted to Vice President, Defined Contribution Client Services. Jones will oversee the management of Pentegra's defined contribution relationship management team, participant call center, compliance and client transition teams, responsible for the day-to-day service and administration of Pentegra's defined contribution clients, participants and advisor-partners.

[Paladina Health](#) has acquired **Activate Healthcare**, creating one of the largest providers of value-based primary care across the United States serving more than 170,000 patients in 18 states. In 2018, Paladina Health announced its acquisition by New Enterprise Associates (NEA), as well as a follow-on financing round from NEA, Oak HC/FT, Alta Partners, Greenspring Associates and other strategic investors.

[OneAmerica Retirement Services](#) has named **Lynne Smith** to a new role leading Strategy and Business Development for the RS division. Smith will be responsible for business and plan development, product development and execution, growth and service model strategies, participant services (including education) and enrollment functions. Smith will report directly to OneAmerica Retirement Services president Sandy McCarthy.

[The National Tax-Deferred Savings Association](#) announced the 2019 finalists for its Elite Advisor Award. It recognizes the contributions of advisors who have advanced best practice standards in the 403(b) and/or 457(b) retirement industry. Chosen from the group of 17 semifinalists, these are the 2019 NTSA Elite Advisor Award finalists:

- Tana Barker, Inspire Financial Group, McKinney, TX; Broker-Dealer, PlanMember Securities
- Leasa Huffman, ChFC, CLU, FLMI, OFG Financial Services, Wakarusa, KS; Broker-Dealer, OFG Financial Services, Inc.
- Gary Immink, Williams & Co. Financial Solutions, Grandville, MI; Broker-Dealer, PlanMember Securities
- Walter Keys, CFP, CRPS, CAPTRUST, Raleigh, NC; Broker-Dealer, CAPFINANCIAL SECURITIES, LLC
- Thomas Kopsie, ChFC, CLU, Kades-Margolis Corporation, Plymouth Meeting, PA; Broker-Dealer, GWN Securities, Inc.
- Randal Lupi, RPS, AXA Advisors, Novelty, OH; Broker-Dealer, AXA Advisors
- Kenneth McInerney, CPFA, Lincoln Investment, Clay, NY; Broker-Dealer, Lincoln Investment
- Erik Peterson, Financial Alternatives, Wanatchee, WA; Broker-Dealer, PlanMember Securities Corporation
- Michelle Tomei, CRC, M3 Investment Services, Royal Oak, MI; Broker-Dealer, Lincoln Investment
- Don Wade, CFP, Lincoln Investment, Downers Grove, IL; Broker-Dealer, Lincoln Investment
- David Wolfe, EFS Advisors, Coon Rapids, MN; Broker-Dealer, Advanced Advisor Group
- Robert Young, One2One Wealth Strategies, Glendale, AZ; Broker-Dealer, PlanMember Securities

Massachusetts Mutual Life Insurance (MassMutual), has appointed three new managing directors to support sales of 401(k)s and other defined contribution retirement plans in the emerging or small-business market:

- Brandon Campbell is responsible for retirement plan sales in Tennessee.
- Tony Robke supports sales of retirement plans in Cincinnati, Ohio and Kentucky.
- Daniel Tobin supports sales of retirement plans in New York City, covering Manhattan, Staten Island, and the Bronx.

Hodges-Mace announced the SmartBen Bridge program for benefit partners and vendors where they can connect to provide a superior benefits delivery experience for their mutual clients. The SmartBen Bridge program information resides on Hodges-Mace's website, where multiple pages have been created for each stakeholder with individual pages into each vendor partnership.

Hand Benefits & Trust (HB&T), a BPAS company, announced the addition of **Chris Hewitt** as its Sales Consultant, Institutional Trust. Hewitt will deliver the full suite of the HB&T Collective Investment Fund (CIF) solutions to asset managers, retirement plan advisors and recordkeepers across the nation.

Four Twenty Seven announced that Founder & CEO, **Emilie Mazzacurati**, has been named to The Top 100 Magazine's, Top 100 in Finance for 2019. Emilie founded Four Twenty Seven

in 2012, just after Hurricane Sandy, to provide market intelligence on the impacts of climate change for financial markets.

[Corporate Insight](#) announced the winners of its annual Monitor Awards, recognizing digital innovation and best practices within the financial services and health care industries. Firms honored included the following, which won gold medals:

- Asset Management – Advisor Monitor: J.P. Morgan, for its improved navigation and content organization and the comprehensiveness of fund details.
- Asset Management – Investor Monitor: Fidelity, for its estate planning resources, including a tool for registered investors that organizes family and financial documents to generate an action plan.
- Retirement Plan Monitor — Fidelity, for adding a personalized section to its participant homepage that encourages action items to improve financial wellness.
- Healthcare Monitor — Cigna, for its member site experience, which lets users conduct health assessments and use provider locator tools in Spanish.
- Life Insurance Monitor — MassMutual, for its advisor site application education that includes product-specific guides with key application elements for each policy, and dedicated resources for client medical interviews, policy changes and term conversions.
- Annuity Monitor — Vanguard, for its predictive public site search, which features popular term definitions, helpful suggestions when a query yields no results or is misspelled, and the only result filters in the coverage group.

In partnership with [CommonBond](#), **Fiat-Chrysler Automobiles (FCA) US** announced that it added a student loan refinancing program to its package of benefits offered to salaried employees. FCA US salaried employees with student loan debt, as well as employees with federal government-backed Parent PLUS loans, are now eligible to refinance these loans through the program with preferred terms.

[The Center for Workforce Health and Performance](#) announced that **Debra Lerner, MSc, PhD** has been named Chairperson of the organization's Board of Directors. Dr. Lerner, a member of the seven-person CWHP Board since November 2017, replaces Thomas Parry, PhD, President of the Integrated Benefits Institute.

HR software platform provider [BerniePortal](#) has partnered with the jobs website, **Indeed**. Jobs created in BerniePortal will be delivered to Indeed via a feed. Candidates can apply to open positions within Indeed's mobile-optimized interface, and applications and responses appear directly in BerniePortal. After the recruitment process is complete, BerniePortal facilitates onboarding and benefits enrollment for successful applicants.

[AM Best](#) released the rankings of the world's largest global insurance companies. Here are the top 10 global insurers ranked by 2017 NPW: 1. UnitedHealth Group Incorporated, United States 2. AXA S.A., France 3. China Life Insurance (Group) Company, China 4. Ping An Insurance (Group) Company of China Ltd., China 5. Allianz SE, Germany 6. Anthem, Inc., United States 7. Kaiser Foundation Group of Health Plans, United States 8. Assicurazioni Generali S.p.A., Italy 9. State Farm Group, United States 10. People's Insurance Company (Group) of China Ltd

ADP and its online storefront, ADP Marketplace, and **[SmartDollar](#)** are working together to bring financial wellness to thousands of employees and their families. SmartDollar is an online, mobile-friendly financial wellness program accessible through ADP Marketplace.