

# USI CONSULTING GROUP

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**FOR IMMEDIATE RELEASE**

## USI Advisors, Inc. is One of the 2016 PLANADVISER Top 100 Retirement Plan Advisers

### *Press Release*

March 18, 2016 – Glastonbury, Conn. – USI Advisors, Inc. (“USIA”) has been named as one of the 2016 PLANADVISER Top 100 Retirement Plan Advisers. The firm was named in two categories: Mega Teams with more than \$5B in Retirement Plan Assets Under Advisement and Mega Teams With More Than 250 Retirement Plans Under Advisement.

To help readers learn about the evolving specialist retirement plan adviser marketplace, PLANSPONSOR introduced a “Most Successful Advisers” list, recognizing 25 individual advisers who had a sizeable book of business in terms of retirement plan assets under advisement (AUA). That list has morphed into the annual “PLANADVISER Top 100 Retirement Plan Advisers,” which includes individual advisers, but also adviser teams, ranging from small, single-office teams to mega firms.

The qualification standards have risen considerably since the first list, as specialist advisers and consultants have built their practices. This year, individuals needed to have more than 100 plans or more than \$1 billion in retirement plan AUA; small teams had to advise more than \$2 billion in retirement plan assets or more than 100 plans; large teams needed more than \$3 billion in retirement plan AUA or more than 170 plans; and mega teams had to oversee more than \$5 billion in retirement plan AUA or more than 250 plan clients.

“USIA is honored to be amongst the top 100 Retirement Plan Advisors, a reflection on the knowledge, dedication and commitment of our employees working to meet and exceed the needs of our loyal clients,” said Michael Welz, President and Chief Investment Officer of USI Advisors, Inc.

“USIA consults nationally and exclusively with retirement plan sponsors of defined benefit, defined contribution and executive compensation programs. We are proud that a large and growing number of organizations look to us as their trusted advisor for investment consulting,” said Bill Tremko, President & CEO of USI Consulting Group.

### **About USIA**

USIA is a registered investment adviser with the Securities and Exchange Commission and is a wholly-owned subsidiary of USI Consulting Group. As a registered investment adviser, USIA provides its clients with the perspective, counsel and support needed to fulfill their fiduciary obligations including the review of investment options and fee structures.

### **About USI Consulting Group**

USI Consulting Group is a premier provider of defined contribution and defined benefit plan consulting and administration services, as well as health and welfare administration. It is the parent company of both USI Securities, Inc. (a broker-dealer, Member FINRA/SIPC) and USI Advisors, Inc. (a federally registered investment adviser) and a wholly owned subsidiary of USI, Inc. (an Onex Corporation private equity partner). Additional information may be found at [www.usicg.com](http://www.usicg.com).

### **About USI Insurance Services**

USI is a top 10 insurance brokerage and consulting firm, delivering property and casualty, employee benefits, personal risk and retirement solutions throughout the United States. Headquartered in Valhalla, New York, USI has over \$1.0 billion in revenue, more than 4,400 professionals and operates out of nearly 140 local offices serving every state. USI has become a premier middle market insurance brokerage firm by leveraging the [USI ONE Advantage®](#), an interactive platform that integrates proprietary analytics, networked resources and enterprise planning to create customized solutions with positive, bottom line impact. The value of USI, and our ability to attract best-in-class industry [talent](#) while providing superior solutions and services to our clients and our [communities](#), is achieved through the collaboration and expertise of our local teams. For more information visit [usi.biz](http://usi.biz).

Investment advice provided to the Plan by USI Advisors, Inc.

Under certain arrangements, securities offered by USI Securities, Inc. Member FINRA/SIPC  
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