

Education Provider of the Year

Financial Finesse
Liz Davidson, CEO

Beyond getting people into the 401(k) plan, this Manhattan Beach, Calif., firm instituted a program of visiting plan sponsors and offering one-on-one sessions with participants. It also included long-term financial planning and asking about how employees allocate expenses, integrating retirement with events such as buying a home. For creating a system designed to integrate all of a participant's needs, treating retirement as a part of a whole, Financial Finesse is the choice for this year's award.



Liz Davidson