

PRESS RELEASE

Fiduciary Benchmarks rebrands as Fiduciary Decisions and optimizes organizational alignment

Tigard, OR April 15, 2021: Fiduciary Benchmarks (FBi) announced today that it is rebranding itself as Fiduciary Decisions (FDI) in recognition of the expansion and broadening of its mission and service offering.

“We started our journey in 2008 as Fiduciary Benchmarks and over the years we became the retirement plan industry’s most trusted partner for benchmarking retirement plans. We did this using our patented method which helps fiduciaries understand not only what they are paying, but more importantly, what they are receiving from their service providers in terms of Quality, Service, Value, and Extra Credit” stated, Tom Kmak CEO of Fiduciary Decisions.

“Today, we start a new journey as Fiduciary Decisions. This is not just a rebranding but a recognition that we have leveraged our core competency of building decision support systems to help service providers and plan sponsors better manage their retirement plans. Examples of the services we offer that are beyond benchmarking include:

- Our Business Management Dashboard – a next generation practice management solution that enables retirement advisors to service and sell plans better than ever before
- IRA Best Interest Determination – a service designed to help with the SEC Best Interest Rule and the recently released DOL PTE on Advice
- Retirement Outcomes Evaluator – an interactive plan design service that allows you to make changes to a plan and see the Marginal Benefits and Marginal Costs of those changes in seconds” said, Kmak.

In addition, the FDI organization is being realigned to better serve both existing and new clients through a reengineered focus on product development, marketing & sales, client success, and research. As such, the following management changes were announced:

- Matt Golda is now Chief Operating Officer focusing on operations, client success and technology
- Craig Rosenthal is now Head of Strategy and Chief Marketing Officer focusing on partnerships, product development and marketing
- Mike Narkoff is now Chief Revenue Officer focusing on enterprise sales across all services and channels
- Kathleen Connelly is now Chief Research Officer focused on leveraging FDI’s industry leading database to benefit our clients and their clients
- Ivana Polonijo is now Chief Client Officer focusing on ensuring that clients using FDI services in the most efficient manner to produce successful outcomes for themselves and their clients
- Brad Williams is now Chief Technology Officer focusing on the buildout and ongoing maintenance of all of FDI’s technology infrastructure

“In addition, we have invested heavily in people – from executives to product managers to those serving clients. These investments have been made with the full intention of serving you better than we ever have before. In fact, we will strive to be your “first call” when it comes to high-quality technology, tools and research related to retirement.” stated Kmak.

About Fiduciary Decisions: Fiduciary Decisions is the industry leader for independent, comprehensive and actionable value and fee benchmarking services for the defined contribution space. FDI also offers the Business Management Dashboard – a next generation practice management platform for Broker/Dealers and retirement plan advisors enabling them to manage their business more efficiently and effectively than ever before. In addition, FDI offers an IRA Rollover Best Interest Determination service. Founded in 2008, 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.fiduciarydecisions.com

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