2026

NTSA AWARDS STORIES

NTSA
National Tax-Deferred Savings Association

LETTER FROM EXECUTIVE DIRECTOR NATE GLASSEY

Hello NTSA Nation,

As expected, 2025 brought about many opportunities and challenges, but one of the things that remains to be unchanged is the accolades that we hear about those in the industry and the ways that you consistently give back to your communities and the industry. I am ever more impressed with the amazing people that do everything they can to add to our growing list of accomplishments. I enjoy seeing all the nominations we receive for our list of awards. The one thing that remains constant for everyone that is nominated for an NTSA award is service of those who do so much for the future. Consistently in applications is the praise from the teachers, school staff, and others in the non-profit and governmental market that you serve. It brings me such joy to see that at the core of what we do is the success of those we serve. For those who are receiving awards this season, THANK YOU! You have gone above and beyond to serve through creativity and dedication. You truly are ELITE in my eyes, and the industry is grateful for all you do.

NATHAN J. GLASSEY
TGPC, QKA®, CRES®

NTSA

National Tax-Deferred Savings Association

ADVOCATE. EDUCATE. GROW.

The National Tax-Deferred Savings Association (NTSA) is the division of the American Retirement Association (ARA) that focuses on the needs of the tax-exempt and non-profit marketplace — as well as public educational institutions — by leading, advocating for, and educating their diverse, professional membership of financial advisors, consultants, administrators, and product creators and providers (all dedicated to meeting client needs). ARA's membership of more than 39,000 professionals is diverse but united by a common dedication to the employer-based retirement plan system.

Formed in 1989, NTSA is nationally recognized for its thought leadership and policy expertise. Its membership — more than 6,000 professionals — provides consulting and administrative services for ERISA non-profit, 403(b), and 457(b) plans covering millions of American public and private workers in the ERISA and non-ERISA space.

On the advocacy front, the NTSA mission is to work effectively and proactively with state and local governments to advance public and private tax-exempt and non-profit employee retirement security, based on the tenets of open access, ethical practices, and a universal standard of care.

NTSA represents its membership in state capitals across the country and in Washington, D.C. They promote public policy, address issues, and design retirement plans that improve employee outcomes. In addition, NTSA coordinates with ARA in its federal-level advocacy on behalf of its Divisions of Membership.

On the education front, the NTSA mission is to provide high quality, forward-thinking, and diverse education opportunities. This professional development — for and with plan sponsors, key decision makers, employees, and related parties — is focused on the needs of these target markets: K-14, higher education, healthcare, church, non-profit, 457(b), and Taft Hartley.

NTSA AWARDS & ACCOLADES

NTSA Awards and accolades demonstrate to the retirement industry and the community at large that NTSA members exemplify commitment to excellence and lifelong service in their field and spheres of influence. Honorees serve as ambassadors of NTSA values to their clients and their communities, highlighting the essence of the NTSA mission in action. The honorees' brief stories here enable us to learn and grow.

The **BOB D. SCHILLER AWARD**, a lifetime recognition, honors individuals who have given freely of themselves, their time, and resources to NTSA and the retirement industry. Honorees have gone above and beyond expectations, making a difference for their clients and the industry. Named in memory of Bob D. Schiller — an enthusiastic NTSA supporter and mentor — this award is given at the NTSA President's discretion.

The **RICHARD FORD VOLUNTEER SERVICE AWARDS** highlight lifetime service, honoring NTSA members who are role models for volunteerism with NTSA and their community. Richard Ford was a founding NTSA member; he exemplified NTSA values through his extraordinary contributions to NTSA and his community throughout his career. NTSA established the awards in his memory in 2019.

The **ELITE ADVISOR AWARDS** celebrate the best-of-the-best of NTSA member financial advisors. These awards focus on those who excel, advocate proactively, lead in profound ways, creatively operate an ever-improving practice, and mentor responsibly. The awardees' presence and innovative work shape best practices with outstanding and unique accomplishments. These awards were established in 2013.

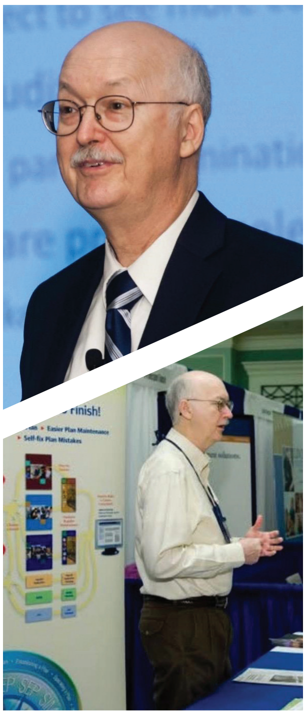
The **EMERGING STAR ACCOLADE** recognizes rising leaders within the NTSA membership who demonstrate exceptional promise, innovation, and early impact in the 403(b), 457(b), and ERISA nonprofit retirement space. This accolade honors members with 2 to 10 years of experience whose leadership, advocacy, and commitment to excellence signal the profession's next generation of leaders.

Honorees are recognized for supporting retirement readiness, serving clients and communities with distinction, and contributing meaningfully to the future of the retirement industry. This accolade was established in 2026.

NTSA

BOB D. SCHILLER AWARD

2026



ED SALYERS

August 26, 1949 – April 19, 2025

Memphis, TN

Ed Salyers was a respected leader, educator, and steady presence in the 403(b) and 457(b) retirement plan community whose influence will be felt for generations. With more than three decades of service as a Senior Employee Plans Specialist in the Tax Exempt and Governmental Entities Division of the Internal Revenue Service, Ed brought clarity, fairness, and professionalism to some of the most complex retirement plan examinations in the country. He played a pivotal role in shaping audit guidelines for 403(b) and 457(b) plans and served as the inaugural 403(b)/457 Coordinator for the Gulf Coast Area — helping establish standards that continue to guide the industry today.

Ed was also a bridge-builder. As a member of the 403(b) Liaison Group formed following the release of the 2007 regulations, he worked alongside advisors, TPAs, consultants, and attorneys to foster collaboration and mutual understanding between practitioners and regulators. His openness, generosity with knowledge, and willingness to engage made him a trusted resource not only within the IRS, but across the entire retirement planning community. Many auditors and professionals credit their success to Ed's mentorship and guidance.

Even after retiring from federal service, Ed remained deeply committed to the field. Through his own CPA practice, he continued to support employers navigating retirement plan audits — bringing the same integrity, practicality, and respect that defined his public service career. He was a familiar and welcome presence at industry meetings, including ASBO events, where he never missed an opportunity to educate, listen, and connect.

Beyond his professional legacy, Ed was known for his warmth, wit, and humanity. A devoted husband, father, and grandfather, he lived by example — so much so that his daughter, a professor, often found herself asking, "What would my dad do?" when guiding her own students. That question captures Ed's lasting impact: thoughtful, principled, and grounded in service. As we honor him with this award, we remember not only what Ed built, but how he built it — with generosity, humor, and an unwavering commitment to doing what was right for this industry and the people it serves.

2026

RICHARD FORD

VOLUNTEER SERVICE AWARD

NTSA

G. DANNY MILLER
Partner
Conner & Winters, LLP

Washington, D.C.

Danny Miller is a distinguished employee benefits attorney whose career has closely tracked the evolution of church retirement plans and the broader 403(b) landscape. Beginning his practice in 1974 — at the moment ERISA reshaped the benefits world — Danny quickly became immersed in the complex challenges facing denominational plans. Early work analyzing a major church 403(b) plan revealed structural issues that prompted his involvement in legislative efforts during the early 1980s, helping amend the church plan definition under federal law and shape policy that continues to guide church retirement programs today.

Over the decades, Danny has become a nationally respected resource within the church benefits community. He has worked extensively with the Church Alliance, an organization formed at his firm's recommendation to address regulatory challenges unique to church plans. He also helps lead a long-running educational program in Scottsdale focused on 403(b) church plan fundamentals, now in its third decade and widely regarded as a cornerstone for professional development in this niche.

Danny's commitment to service extends beyond his legal practice. He is an active member of his parish, frequently advises pastors and church volunteers, and is a sought-after speaker at national gatherings across the church benefits community. Within the NTSA/ARA community, he serves on the Government Affairs Committee, contributing thoughtful insight on policy issues affecting church plans and regularly presenting at conferences on emerging and foundational topics alike.

Known for his humility, generosity of expertise, and lifelong dedication to education and service, Danny is widely trusted for both his technical mastery and principled approach. His career reflects a sustained commitment to strengthening retirement systems, supporting faith-based organizations, and advancing the professionals who serve them.

RICHARD FORD
VOLUNTEER SERVICE AWARD
NTSA

NTSA 2026 RICHARD FORD VOLUNTEER SERVICE AWARDS (FVSA) JUDGING COMMITTEE

The Awards Judging Committee for the Richard Ford Volunteer Service Awards themselves show significant NTSA volunteerism and personal commitment to NTSA and community service. The members include:

Chair:
JULIE ARANOWITZ, CFP®, GWN, Inc., Lansdale, PA

JEN ROSSIGNOL, PlanMember, Carpinteria, CA

ADAM PEARCE, CFP®, CRES® Retirement Professionals, Phoenix, AZ, Lincoln Investment

TONY SCHUTTE, EFS Advisors, Rochester, MN

PREVIOUS FVSA HONOREES

DAVID BLASK, CPC™, TGPC, AIF®, CRES® Lincoln Investment, Fort Washington, PA (2020)

DONNA CALOIA, CRES® formerly of Lincoln Investment, Palm Beach, FL (2020)

SUSAN D. DIEHL, QPA™, CPC™, ERPA, TGPC, BCF™ PenServ Plan Services, Inc. Horsham, PA (2023)

NATHAN GLASSEY, TGPC, QKA®, CRES® formerly of National Benefit Services, West Jordan, UT (2022)

TAMARA L. INDIANER, CFP®, AIF®, CRES® Lincoln Investment, Waltham, MA (2021)

PHILIP KIM, CFP®, ChFC®, CLU®, RICP®, CRES® Signature Wealth Concepts, Scottsdale, AZ, Equitable (2022)

KRIS COFFEY, CPC™, CPFA™, CRES® CPE Associates, Ltd., Pewaukee, WI (2024)

ADAM PEARCE, CFP®, CRES® Retirement Professionals, Phoenix, AZ, Lincoln Investment (2021)

KENT SCHUTTE, TGPC, CRES®, CLU®, ChFC®, CFP® EFS Advisors, Cambridge, MN (2021)

LISA STUBBS, CRES® Security Benefit, Topeka, KS (2020)

NTSA MEMBER ELITE ADVISORS 2014 THROUGH 2025

S. BRUCE ALLEN, CRES®
Old Dominion Investments and Insurance, Winchester, VA; PlanMember (2014)

RANDY E. ARANOWITZ, CLU®, TGPC, CLTC®
Kades-Margolis, Lakewood Ranch, FL (2014)

MARTIN ARINAGA, ChFC®, CFP®
Chinen & Arinaga Financial, Mililani, HI; PlanMember (2016)

JOSEPH AVALLONE
Retirement Planning Associates, Winter Springs, FL; PlanMember (2020)

KATHRYN CAWLEY, CSA
The Voyager Group, Ltd., Joliet, IL; Lincoln Investment (2015)

MICHAEL CAYEN, CRC®
Cambridge Investments, Royal Oak, MI (2017)

JOSHUA R. DECKER, CFP®
EFS Advisors, St. Paul, MN (2016)

LOUIS DEPPAS
Lincoln Investment, Lakewood, NY (2015)

JODY DETILLIER, ChFC®, RICP®, TGPC, LUTCF®
CLTC®, CPFA®, CRES®
Detillier Financial Advisors, LLC, Lutcher, LA; Lincoln Investment (2015)

CHARLES "SONNY" DETILLIER (retired)
Detillier Financial Advisors, LLC, Lutcher, LA; Lincoln Investment (2014)

RICHARD DOBSON, CFP®
American Financial Management, Ltd., Cedar Falls, IA (2014)

ALBERTO GAGLIANESE, CFP®, AIF®, CRES®
Clearpath Wealth Partners, LLC, Marlton, NJ; Lincoln Investment (2022)

CARLA-ANN E. GOEDTKE, CPFA®, CRES®, MRFC®, CSA®
Investors Choice Financial Services, Slayton, MN; American Portfolios (2022)

MICHAEL GOLDBERG, CRES®
Equitable Advisors, LLC, Southeast Complex, Boca Raton, FL (2021)

SHANE HALL
Shane Hall Financial, Amarillo, TX; PlanMember (2018)

TOMMY HALL
Tax Sheltered Planning, Fayetteville, NC; GWN (2016)

VIRGINIA T. HARRIETT, CFP®, CRES®, AIF®
Harriet Financial Group, Marlton, NJ; Lincoln Investment (2022)

SCOTT HAYES, CFP®, TGPC, CPFA®
ISC Group, Inc, Dallas, TX (2017)

CHAD HUFFORD
Veritas Wealth Management, Anchorage, TX; PlanMember (2017)

GARY IMMINK
Williams & Company, Grandville, MI; PlanMember (2019)

STEWART JACOBSON, JD, CFP®
Dearborn & Creggs, Sugar Land, TX; Lincoln Investment (2017)

WAT KEYS, CFP®, CRPS®
CapTrust, Raleigh, NC (2019)

PHILIP KIM, CFP®, ChFC®, RICP®, CRES®
Signature Wealth Concepts, Scottsdale, AZ; Equitable (2016)

KELLY LARKIN, CFP®
Kelly A. Larkin, Seattle, WA; Lincoln Investment (2023)

RANDAL LUPI, RPS
Equitable Advisors, LLC, Novelty, OH (2019)

SARA E. MCGRATH, AIF®, CRES®
Clifford & Rano Associates, Inc., Worcester, MA; Lincoln Investment (2020)

MITCH MELAN
Melan Financial, Dunwoody, GA; Lincoln Investment (2023)

JOHN "JAY" MERRILL
Lincoln Investment, Worcester, MA (2025)

FRANK R. OWEN, III, CLU®, ChFC®
F.R. Owen and Associates, Charlotte, NC (2014)

ADAM PEARCE, CFP®, CRES®
Retirement Professionals, Phoenix, AZ; Lincoln Investment (2016)

LARRY POOLE
Lincoln Investment, Albemarie, NC (2024)

JENNIFER PROSISE, CFP®, CRES®,
The Voyager Group, Ltd., Joliet, IL; Lincoln Investment (2023)

SHANE ROBINSON
Robinson and Associates, Greenville, NC; Lincoln Investment (2021)

KENT SCHUTTE, CFP®, ChFC®, CLU®, TGPC, CRES®
EFS Advisors, Cambridge, MN (2018)

TONY SCHUTTE
EFS Advisors, Rochester, MN (2024)

BRUCE SMITH (retired)
CalPro Network, San Diego, CA; PlanMember (2014)

JEFFREY J. SMITH (deceased)
Lombard, IL; Lincoln Investment (2014)

JILL SNYDER, TGPC
DSE Financial, Delafield, WI; GWN (2014)

RIAN STEINBISS, AIF®, CRES®
Clearpath Wealth Partners, LLC, Marlton, NJ; Lincoln Investment (2023)

LISA TURSI, AIF®, CRES®
Clifford & Rano Associates, Inc., Worchester, MA; Lincoln Investment (2021)

DONALD E. WADE, CRES®, CFP®*
The Legend Group, Lombard, IL; Lincoln Investment (2023)

JONATHAN WICKER
Lincoln Investment, Sewickley, PA (2024)

RICHARD E. WILLIAMS, CRS®
Williams & Company, Grandville, MI; PlanMember (2015)

CHRISTINA WINTERS, AIF®, BFA
Creating & Managing Wealth, LLC, Irving, TX; Lincoln Investment (2018)

DAVID WOLFE, CRES®
EFS Advisors, Minneapolis, MN (2020)

ROBERT YOUNG, CRES®
One-2-One Wealth Strategies, Scottsdale, AZ; LPL (2019)

2026 NTSA ELITE ADVISOR AWARDS

NTSA ELITE ADVISOR AWARDS JUDGING PROCESS

Anonymity marks the awards' judging process, with all nominations, applications, and affirmations being fully redacted before the judges carefully consider, individually, the honored nominees' quantitative and qualitative submissions. Then together, the judges consult, collaborate, and come to consensus, facing the hard task of anonymously choosing the best of the best from their own extensive experience, expertise, and responsibility.

NTSA 2026 ELITE ADVISOR AWARDS JUDGING COMMITTEE

Chair:
DAVID WOLFE, CRES®, 2020 EA EFS Advisors, Coon Rapids, MN

CHRISTOPHER JANEWAY, CPFA®, Fourth Point Wealth, PlanMember, Newport Beach, CA

MICHAEL GOLDBERG, 2021 EA Equitable, Boca Raton, FL

LISA TURSI, CRES®, 2021 EA Clifford Rano, Lincoln Investment, Worcester, MA

CARLA-ANN GOEDTKE, MRFC®, CPFA®, CSA®, 2022 EA Investors Choice Financial Services, Inc., Slayton, MN

JERROLD E. BECK
CRES®, AIF®, CLTC,
FINRA Series 6, 7,
and 65 licenses

Kades-Margolis
Lancaster, PA

2026 NTSA ELITE ADVISOR AWARDS

RETIREMENT ASSETS UNDER ADVISEMENT: $1,200,000+

PARTICIPANTS SERVED: 643

SCHOOL DISTRICTS SERVED: 25

Jerrold (Jerry) E. Beck is a veteran financial advisor with more than two decades of experience dedicated to serving Pennsylvania's public school educators. His practice is built on a relationship-first, education-driven approach, helping teachers and school employees navigate complex retirement systems with clarity and confidence. By translating PSERS, 403(b), and 457 planning into practical, understandable guidance, Jerry empowers clients to make informed decisions that support their long-term financial well-being.

At the heart of Jerry's work is a commitment to professionalism and advocacy. He actively partners with professional associations, teacher organizations, and school district leaders to expand access to clear, unbiased retirement education. Staying closely engaged with regulatory and legislative developments, he shares timely insights with clients and colleagues alike — reinforcing fiduciary responsibility, transparency, and best practices across the industry.

Jerry views leadership as a responsibility to elevate others. Within his firm and beyond, he mentors fellow advisors by sharing proven client communication strategies, compliance insights, and real-world planning experience. He also plays a key role in developing educational programs, workshops, and community outreach initiatives that have helped thousands of educators avoid costly mistakes at critical life moments.

Legacy, for Jerry, is measured not by production numbers, but by impact. He has intentionally built a repeatable, niche-focused advisory model centered on education, integrity, and service to the public education community. By prioritizing impact over income and education over persuasion, Jerry continues to strengthen trust in the profession and ensure that advisors are seen as long-term partners and stewards of their clients' futures.

He resides in Lancaster, Pennsylvania, with his wife and three daughters, and remains deeply committed to serving the educators who serve their communities every day.

2026 NTSA ELITE ADVISOR AWARDS

TYLER KIMBALL

CFP and FINRA Series 7 and 66 licenses

Kades-Margolis
Pittsburgh, PA

RETIREMENT ASSETS UNDER ADVISEMENT: $162,000,000+

PARTICIPANTS SERVED: 900

SCHOOL DISTRICTS SERVED: 12

Tyler Kimball is a seasoned financial advisor with more than 16 years of experience serving Pennsylvania's education community. Based in Greensburg, he oversees more than $162 million in assets for over 900 participants across multiple school districts and plan sponsors. Tyler leads a high-touch, relationship-driven practice designed to ensure every client — regardless of tenure or asset level — receives consistent, thoughtful guidance rooted in trust and care.

A graduate of the University of Pittsburgh and a member of the Kades-Margolis Leadership Council, Tyler views advocacy as a core responsibility of his profession. He remains actively engaged with industry organizations and collaborative partners to promote transparency, fairness, and access in public-sector retirement planning. By contributing advisor perspectives to policy discussions and staying informed on legislative developments, Tyler helps ensure that the voices of educators and those who serve them are represented at every level.

Tyler has intentionally built a practice that balances growth with personal connection. Supported by a dedicated staff and junior advisor, his team blends thoughtful technology with a hands-on service model, ensuring clients always interact with people they know and trust. This approach reflects his belief that every dollar matters equally and that long-term relationships — not transactions — define meaningful financial planning.

His legacy is rooted in people and place. Operating out of a renovated historic building in the heart of the community, Tyler and his team are deeply woven into the local fabric they serve. By investing in mentorship, community involvement, and transparent, capable planning, he is building a lasting model of professionalism — one that supports educators and elevates the retirement-planning profession for decades to come.

Emerging Star 2026

NTSA

REBECCA TRETHEWEY,
CPFA®, NQPC™, TGPC, CRES®
EFS Advisors

Cambridge, MN

Rebecca Trethewey is the recipient of the inaugural Emerging Star Accolade, recognized for a career marked by early impact, leadership, and service within the retirement and financial wellness community. In just seven years as a financial advisor, Rebecca has distinguished herself through her dedication to clients, her organization, and the broader mission of the NTSA, quickly establishing herself as a rising leader in the industry.

Throughout her career, Rebecca has worked with more than 1,000 participants, helping individuals navigate financial decisions with clarity and confidence. Alongside her professional responsibilities, she has demonstrated a strong commitment to advancing the industry through active volunteerism. She currently serves on both the NTSA Business Intelligence Committee and the Summit Planning Committee and has contributed her expertise through multiple Rai$e Her educational sessions.

Rebecca's commitment to service extends beyond her professional roles. Within her local community, she hosts a free Women & Wealth event designed to promote financial empowerment and address meaningful topics such as long-term planning and support for caregivers. Through these efforts, she continues to expand access to financial education and foster inclusive conversations around wealth and well-being.

Known for her collaborative spirit, passion for education, and drive to make a positive impact, Rebecca exemplifies the values at the heart of the Emerging Star Accolade. Her work reflects a strong dedication to strengthening the profession, supporting her community, and contributing to the future of the retirement services industry.

NTSA expresses its gratitude to its Strategic Partners, whose support is key to the accomplishment of our mission and to serving our members, our industry and ultimately the plan participants and their dependents and beneficiaries.

- ADMIN Partners
- American Fidelity
- Aspire
- Daybright Financial
- EFS Advisors
- Equitable
- GWN Securities
- Horace Mann
- Invesco
- Kades-Margolis | A Daybright Financial Company
- Lincoln Investment
- National Benefit Services
- National Life Group
- OFG Financial Services
- PenServ Plan Service
- PlanMember Services
- Security Benefit

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