



FOR IMMEDIATE RELEASE

## Beltz Ianni & Associates Makes List of Top DC Advisor Teams

**Rochester, NY, April 1, 2021** – Beltz Ianni & Associates is pleased to be named a NAPA Top DC Advisor Team.

The National Association of Plan Advisors (“NAPA”) has published its list of the nation’s top defined contribution (DC) Advisor Teams and includes the retirements’ plan services team at Beltz Ianni & Associates.

This year’s list focuses on firms with self-reported DC assets under advisement at least \$100 million.

According to Adam Nevins, Chief Content Officer of the American Retirement Association, and Editor-in-Chief of NAPA-Net, these teams represent the interests of some 30 million working Americans to prepare for a financially satisfying retirement.

The list of NAPA’s Top DC Advisor Teams is available online at <https://www.napa-net.org/industry-intel/industry-lists/top-dc-advisor-teams-2020>. For more information on the NAPA Top DC Advisor Team announcement, please visit <https://www.napa-net.org/news-info/daily-news/announcing-napa-top-dc-advisor-teams> <https://www.napa-net.org/news-info/daily-news/announcing-napa-top-dc-advisor-teams>



Selected based solely on defined contribution (DC) plan assets under advisement as reported directly by nominees.

### About Beltz Ianni & Associates

Located in Rochester and serving Western New York since 2001, Beltz Ianni & Associates is a comprehensive financial services firm, focused on helping people as they prepare for and strive to maintain a successful retirement. In addition to managing the wealth concerns of employees through their retirement plan business services, Beltz Ianni & Associates provides retirement, insurance, and investment planning for individual clients. More information about Beltz Ianni & Associates can be found at [www.beltz-ianni.com](http://www.beltz-ianni.com) or [info@beltz-ianni.com](mailto:info@beltz-ianni.com).

Securities and advisory services offered through LPL Financial, a Registered Investment Advisor, Member FINRA/SIPC. Beltz Ianni & Associates and LPL Financial are separate entities.

For more information, contact:

Monica Sanna

Client Services Associate

[Monica.Sanna@beltz-ianni.com](mailto:Monica.Sanna@beltz-ianni.com), (585) 340-5216