

## Slideshow In review: EBA 2017 Advisers of the Year

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By **Elizabeth Galentine**

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## 2017 Advisers of the Year

At a time of health reform-fueled uncertainty, leaders don't stand back and wait to react. Instead, they are forging a path forward with their innovative ideas and unique approach to the market. Chosen by the editorial team after a month-long online nomination process, and sponsored by ADP, *Employee Benefit Adviser's* Advisers of the Year — in the categories of Retirement, Technology, Voluntary, Wellness and overall winner — are not waiting to solve today's pressing issues. They're growing retirement plan participation. They're creating new ben admin systems. They're teaching the importance of supplemental benefits. They're tackling physical and mental health obstacles. And they're putting their own compensation on the line to ensure employers find real, measurable value in their work.

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## Retirement Adviser of the Year

Robert Judd  
Managing Partner  
Beltz Ianni & Associates

In the past year, Judd helped his firm add 20 new retirement plan clients to its book of business. The advisory firm now serves 76 retirement plan sponsors and their participants with more than \$147 million in retirement plan assets. Judd energized his company's Total Retirement Plan Management program that takes a plan sponsor through each and every step of what needs to be done. "What we're doing is basically becoming an angel on their shoulder," Judd says. "When they are given information and are not sure what they are being told, we can use our background to help them through that."



## Technology Adviser of the Year

Manish Kumar  
VP of Engineering  
Sequoia Consulting Group

For someone who only joined his company two and half years ago, Manish Kumar has accomplished major technology feats. Not only was the vice president of technology the first engineer to work for the Bay Area benefit brokerage, Kumar has helped to create and complete several technology projects that put Sequoia Consulting on the map. Sequoia Mobile, an employee information app created by Kumar and his team, was expected to have 2,000 users when introduced last December. To date, it has 6,000. "The response is quite incredible and now our target bar is raised even further," Kumar says.

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## Voluntary Adviser of the Year

Eric Silverman  
Principal and Owner  
Silverman Benefits Group

As the benefit industry continues to gravitate to voluntary benefits to enhance employers' health plans and provide additional benefits, Silverman is at the forefront of this movement. With 750 commercial payroll accounts across the country, he achieved double-digit growth in 2016 and is on pace to exceed that level in 2017. Silverman prides himself as the go-to guy for brokerages that cannot handle voluntary benefits on their own. Over the last decade alone, he has recruited, trained and developed more than 2,000 commission sales agents, interns and broker partners, which have led to the securing of more than 2,500 commercial worksite payroll accounts and the generation of more than \$65 million in gross annualized revenue.

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## Wellness Adviser of the Year

Valeria Tivnan  
Director of Population Health and Well-Being  
EBS Insurance Brokers Inc.

Tivnan's mission in life is to have employees leave their office every day healthier than when they arrived. She is making that change daily for thousands of employees in New England through outside-the-box wellness platforms, such as ready-to-eat meal options delivered straight to the office. Tivnan has a bachelor's in physical education, a master's in education and a master's in public health. Despite her unparalleled qualifications, it is her dedication to her clients and her job that make her so unique. One client says of Tivnan, "I feel like my employees are her employees. It's not just a job for her. She lives it. She wants to make people healthy, she wants to make people better, she wants people to perform, and she wants to make people happy."

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## **Employee Benefit Adviser of the Year (overall winner)**

Mick Rodgers  
Managing Partner  
Axial Benefits Group

Rodgers is widely respected for his unbridled commitment to staring down rising healthcare premium increases on behalf of mid-market employer clients, as well as bravely advocating total transparency around broker compensation to a point where he puts part of his own fee at risk. The former engineer boasts eye-popping results to back that reputation. Per employee per year costs for proprietary healthcare purchasing coalitions he created are nearly half the national average. ABG's performance is based on a simple formula for each prospective new member of a coalition: the difference between current PEPY costs and what the employer would like it to be. "We're going to set a less than 3% trend or less than what the PEPY cost was the year before," Rodgers says. "We have an expression: it's not what you buy, it's how you buy it."

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**Elizabeth Galentine**