

# GRINKMEYER LEONARD FINANCIAL

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## FOR IMMEDIATE RELEASE

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## Jamie Kertis of Grinkmeyer Leonard Financial Honored on NAPA's 2019 "Top Women Advisors" and "Top Retirement Plan Advisors Under 40" Lists

**BIRMINGHAM, ALABAMA (January 13, 2020)**— Grinkmeyer Leonard Financial, a financial advisory services firm in Birmingham, Alabama, today announces that its Retirement Plan Specialist, **Jamie Kertis**, QKA, AIF®, CPFA, has been named to the **National Association of Plan Advisors (NAPA) "Top Women Advisors"** and **"Top Retirement Plan Advisors Under 40"** lists for 2019. Both lists were published in *NAPA Net the Magazine*, will be acknowledged at the 2020 NAPA 401(k) Summit, and are currently featured on [www.napa-net.org](http://www.napa-net.org). "It is exciting to see that Jamie has been so deservedly recognized for her many achievements and contributions to the retirement industry," says Valerie Leonard, co-founder of the firm.

As a retirement plan specialist, Jamie works with business leaders and human resource professionals to design, implement, and manage a total benefit strategy. As a valued member of the Grinkmeyer Leonard Financial advisory team, Jamie helps companies design retirement plans that not only represent the best interests of their employees, but also plans that help attract and reward top level executives.

"There is nothing more exciting professionally than to be recognized for doing a job I love and, therefore, I am thrilled and humbled to be included in these two dynamic and impactful groups of professionals," said Jamie. "I do not take it lightly that the work that we are doing directly impacts everyday Americans' ability to live the type of retirement they envision and work so hard to achieve. My goal is to build upon the job that I have done with Grinkmeyer Leonard Financial to continue to reach more people in the future."

### About NAPA Top Women Advisors

The Top Women Advisors list was created by NAPA to recognize the growing number of women who are making significant contributions to the retirement plan industry. Nominations were made by NAPA Broker-Dealer and RIA partners. Honorees were selected by a panel of judges based on criteria such as a candidate's percent revenues derived from retirement plans, total plan assets under management/advisement, years of experience working with workplace retirement plans, regulatory compliance record, and credentials. Votes were utilized to break ties, if applicable. List makers were honored in three separate categories: All-Stars, Captains, and Rising Stars<sup>1</sup>. 209 advisors were considered for this award. 109 (52% of candidates) were named to the list. List makers were then separated into three different categories: All-Stars, Captains, and Rising Stars. The nominated advisor need not be a NAPA member. This award is not indicative of the wealth manager's future performance. Your experience may vary. For more information, please visit [www.napa-net.org](http://www.napa-net.org).

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## About NAPA Top Retirement Plan Advisors Under 40

Established in 2014, the NAPA Top Retirement Plan Advisors Under 40 list includes plan advisors who have built a solid practice—either alone or as part of a team—and are established leaders ready to take their defined contribution (DC) and 401(k) plans to the next level. Nominations were solicited by NAPA members. Nominees were asked to complete an application and winners were chosen based on criteria that include current and new DC assets under management, DC plans for the past 12 and 24 months, DC/DB plan revenue. Votes were utilized to break ties, if applicable. The nominated advisor need not be a NAPA member. 512 advisors were considered for the award. 100 (19.5% of candidates) were recognized. This award is not indicative of the wealth manager's future performance. Your experience may vary. For more information, please visit: [www.napa-net.org](http://www.napa-net.org).

## About Grinkmeyer Leonard Financial

Grinkmeyer Leonard Financial has been providing individuals and organizations with financial guidance since 2007. Located at 2279 Valleydale Road, Suite 210, Birmingham, Alabama, 35244, the firm prides itself on crafting unique strategies for each client. For more information, please visit [www.grinkmeyerleonard.com](http://www.grinkmeyerleonard.com). Trent Grinkmeyer, Valerie Leonard, and Jamie Kertis are Registered Representatives and Investment Adviser Representatives with/and offer securities and advisory services through Commonwealth Financial Network, Member FINRA/SIPC, a Registered Investment Adviser. Fixed insurance products and services offered through Grinkmeyer Leonard Financial or CES Insurance Agency. This communication is not intended to replace the advice of a qualified tax advisor or attorney.

(1) *In 2019 there were 50 Captains, 50 All-stars, and 19 Rising Stars. As defined by NAPA. All-Stars: top producers who have their own practices. Captains: All-Stars who happen to be principals, owners, or team captains of their organizations. Rising Stars: top producers who have less than five years' experience with retirement plans as a financial advisor.*

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