
The Bucket

By Editorial Staff *Thu, May 2, 2013*

Brief or late-breaking items from MassMutual, Nationwide and ASPIre.

MassMutual Retirement Services appoints new managing director

Kirk Buchanan has been named managing director of institutional sales of MassMutual's Retirement Services Division, effective April 8, the company announced. He had been regional sales director for The Hartford's Retirement Plans Group (RPG) for many years.

Buchanan serves on the dedicated local sales team covering Northern Texas and Oklahoma. Partnering with MassMutual sales directors Jeff Revell and Travis Cox, he will be responsible for business development and sales support of MassMutual's third-party and dedicated distribution channels focusing on mid-market retirement plans. He is based in Dallas, Texas, and reports to Tanya Jones, western divisional sales manager with MassMutual's Retirement Services Division.

Buchanan holds a Bachelor of Science in Business and Professional Development from Amberton University. In addition, he holds a Certificate in Pension Law and Administration from The Philadelphia Institute and a Certified Retirement Counselor (CRC) designation from the International Foundation for Retirement Education in McLean, Virginia. He currently serves on the Board of the Dallas/Ft. Worth Chapter of the ASPPA Benefits Council and is also a noted author and publisher of nine books.

Nationwide Financial creates DCIO sales team

Nationwide Financial today announced a new defined contribution investment only (DCIO) team to help drive sales of Nationwide Funds by retirement plan advisors. The new members of the DCIO sales team are:

Jeff Gardner will serve as the divisional vice president for the DCIO team, and will be responsible for leading the team. He previously led Nationwide Financial's fee-based sales team. He earned a master's degree in business administration from the University of Georgia and a bachelor's degree from Fordham University.

Eleana McLane will serve as the regional vice president for the Northeast territory. She joined Nationwide Financial in 2009 and was a regional wholesaler for the fee-based team. She has worked in the financial industry since 1984. She earned a bachelor's degree from Rider University.

Mark McGowan will serve as the regional vice president for the Central region. He previously worked for Nationwide Financial's private-sector retirement plans business as a regional wholesaler in St. Louis. He earned a bachelor's degree in communications from the University of Illinois, Urbana - Champaign and holds an AIFA designation.

Bruce Guarino will serve as the regional vice president for the West Coast. His previous position with Nationwide Financial was as a regional wholesaler for the fee-based team.

Chad Metzger will serve as the regional vice president for the Midwest and Southeast territories. Metzger joined Nationwide Financial in 2009 and worked to increase sales to fee-based advisors. He holds a master's degree in finance from Xavier University and a bachelor's degree in accounting and finance from The Ohio State University.

ASpire Financial Services enhances client services team

ASpire Financial Services LLC, a provider of "conflict-free retirement plan solutions," has "advanced its client service delivery model through the addition of top talent, process optimization and a customer relationship management (CRM) solution," the company said in a release.

ASpire's new Client Services group will engage clients in three primary areas: implementation, relationship management and customer support. As part of the client service initiative, ASpire hired 30 professionals this year.

ERISA attorney Jennifer Tanck was appointed vice president of Client Services. Lisa Esker, Customer Service Manager, will lead the call center. She had been assistant vice president, Retirement Plan Services Contact Center, at Raymond James.

ASpire Financial Services LLC provides customizable services for retirement plans (e.g. 401(k), 403(b), 457(b) and IRA). It has approximately 150 employees and just under \$12 billion of recordkeeping assets, 8,000 plans and 255,000 participants.

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