



FRANCIS

Investment Counsel LLC



Francis Investment Counsel Wins Eddy Awards with MoneyAdvice@Work® Team

Pensions & Investments' annual Eddy Awards recognize excellence in defined contribution participant services. The nation-wide competition honors service providers and plan sponsors whose efforts motivate and educate retirement plan participants through effective, impactful financial education and communication. Entering as a service provider or jointly with a plan sponsor, Francis Investment Counsel's MoneyAdvice@Work® Team has earned ten Eddy Awards since 2011, most recently winning three awards in 2019.



2019 Award-Winning Joint Entries



- National construction company working coast to coast in the education, health care, energy, and manufacturing industries
- First Place Eddy Award – “Financial Wellness” Category



- Industry-leading mortgage insurance provider, helping borrowers achieve their dreams of homeownership by supporting lenders nationwide
- First Place Eddy Award – “Pre-Retirement Preparation” Category



- World's largest manufacturer of furniture, investing in the latest tools and equipment, and most importantly, in its people
- Second Place Eddy Award – “Special Projects” Category

2019 Eddy Award recognition received based on *Pensions & Investments* annual evaluation process. Winners demonstrated program effectiveness and creativity, as well as completion of the entry form, which included a \$150 fee per entry. Number of entries varies annually but averages 130-150. Selection criteria weighted differently based upon the category, but in general, creativity and the ease of understanding complex topics was key in determining successful entries. Francis Investment Counsel completed three submissions in the entry type “Joint – Plan sponsor and service provider entering together as a team,” and was recognized with a first place award in the “Financial Wellness” category, a first place award in the “Pre-Retirement Preparation” category, and a second place award in the “Special Projects” category. 2019 Eddy Awards represent the eighth, ninth, and tenth times Francis Investment Counsel has received such recognition, having previously received Eddy Awards in 2011, 2012, 2014, 2016, and 2018. In 2019, a total of 66 defined contribution plan education programs were recognized with a First, Second, or Third-Placed Eddy Award, based on the entry category, size of the plan, and educational topic discussed. Francis Investment Counsel is not affiliated with and does not receive remuneration from *Pensions & Investments*. Receipt of this award should not be construed as a guarantee of future performance or results.