

# FinDec Named to the NAPA Top Retirement Plan Advisor List for 2021

**Stockton, CA** — The National Association of Plan Advisors, an affiliate organization of the American Retirement Association created by and for retirement plan advisors, has named FinDec among others in the top plan advisor list for 2021. While the financial services industry is well represented in Washington by a number of trade associations that weigh in on issues affecting advisors, NAPA is the only advocacy group focused solely on the issues that matter to retirement plan advisors. Being selected for the top list sets FinDec apart and presents them as a valuable resource for the industry.

Clients' fiscal hopes and plans has been FinDec's primary focus since inception decades ago. Their work supports families and businesses so they can look beyond the minutia and develop strategies that work for them, not the financial institutions. Receiving top plan advisor status is a great honor that backs the dedication that FinDec has put in to ensure success for their clients.

*The key to building a sustainable business ultimately comes down to your team. Having an understanding and value for differences in perspectives, personalities, talents and skills, really goes a long way. An organization is benefited by the collaboration and influence of each person involved. When you assemble a diverse and talented team balanced with introverts and extroverts, seasoned professionals and young entrepreneurs, visionaries and tactical executors, you will be rewarded with the very best productivity and outcomes.*

- Michael Lee, FinDec President & CEO

Bringing a fresh new perspective to a complex and serious industry, FinDec aims to educate, inform, and challenge clients to make the best financial decisions possible. They are a premium brand that always relates their communications to current and relevant situations, existing to help their clients grow. FinDec has made progress in positioning their leaders in front of their industry, providing opportunities to contribute valuable knowledge in a very public space, most notably with recent acceptances into the Forbes Business and Finance Councils.

## FinDec Top Executives Selected for Forbes Councils'

FinDec is proud to announce that two of their top executives, President & CEO, Michael Lee, along with Chief Investment Officer, Tolen Teigen, have been accepted into the reputable and respected Forbes Councils'.

Tolen and Michael's acceptance into the Forbes Councils' have afforded them access to a variety of exclusive opportunities designed to help them reach peak professional influence. They will connect and collaborate with other respected local leaders in a private forum and at members-

only events. In addition, they are both afforded the opportunity to work with a professional editorial team to share expert insights in original business articles on Forbes.com, and to contribute to published Q&A panels alongside other experts.

## ABOUT FORBES COUNCILS

Forbes Councils is a collective of invitation-only communities created in partnership with Forbes and the expert community builders who founded Young Entrepreneur Council (YEC). In Forbes Councils, exceptional business owners and leaders come together with the people and resources that can help them thrive.

To learn more about Forbes Councils, visit [forbescouncils.com](https://forbescouncils.com).

## ABOUT FINDEC

FinDec provides comprehensive financial planning, wealth management, and workplace benefits consulting and related services. FinDec was founded as a family-owned and operated “mom and pop” shop that has grown into a corporation serving clients nationwide out of our multiple locations.

Since inception, we have focused on putting clients first. We have brought on team members over the years who have shared in the vision of helping people build wealth over time. We’ve come a long way since we first opened our doors more than 30 years ago — what has always been at the core of what we do is an effort to earn the ongoing trust of our clients. As we embrace new techniques, technologies and thinking, we always keep our eye on what’s most important: Our clients and the trust they have in us.

To learn more, visit their website at [www.findex.com](https://www.findex.com).

*We, us and our refer to FinDec<sup>SM</sup> unless otherwise noted. FinDec<sup>SM</sup> is the service mark under which FinDec Co., and its subsidiaries, FinDec Wealth Services, Inc., FinDec Benefit Services, Inc., and FinDec Insurance Services, Inc. do business.*

*FinDec Wealth Services, Inc. (FDW) is an investment adviser with its principal place of business located in Stockton, California. FDW is registered with the Securities and Exchange Commission (SEC). Registration as an investment adviser does not imply any specific level of skill or training and does not constitute an endorsement of the firm by the Commission. FDW only transacts business in states in which it is properly registered or is excluded or exempted from registration. A copy of FDW's current written disclosure brochure filed with the SEC which discusses among other things,*

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