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Benefits & retirement newsmakers: ARA, Cigna, HUB, Lockton Dunning Benefits, Mercer Global Advisors, Sun Life Financial

News from Arthur J. Gallagher, CFP Board, Crescent Capital Group, HERO, Higginbotham, Lipscomb & Pitts Insurance, Evernorth, Pentegra, PCS Retirement, Pinnacle Actuarial Resources, Reed Smith, The SPARK Institute, Wagner Law Group, Zywave.

By [C.J. Marwitz \(/author/profile/C.J.-Marwitz/\)](#) | January 12, 2021 at 06:07 AM

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Mergers and acquisitions in insurance and the financial services industry seem to be increasing in the last year or so. In addition, new roles, new hires, and promotions continue despite the difficulties created by the pandemic. Here are a few that crossed our desk lately.

Zywave (https://www.zywave.com/) announced the addition of **Scott Rudy** as its chief revenue officer. Rudy brings to the newly created role sales and leadership experience at various high-profile tech companies, most recently serving as chief sales officer of Paycor. He will oversee Zywave's sales, marketing, services and support functions.

The Wagner Law Group (https://www.wagnerlawgroup.com/) announced that

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- 2 **[CDC: U.S. 2020 deaths total will be at least 12% higher than expected \(/2021/01/12/u-s-2020-deaths-total-will-be-at-least-12-higher-than-expected-412-109675/\)](#)**
- 3 **[8 IRA, 401\(k\) numbers to know for 2021 \(/2021/01/12/8-ira-401k-numbers-to-know-for-2021-412-109702/\)](#)**
- 4 **[How benefits brokers are preparing for new health care transparency rules \(/2021/01/12/how-benefits-brokers-are-preparing-for-new-health-care-transparency-rules/\)](#)**
- 5 **[EEOC issues revised wellness rules proposal \(/2021/01/08/eec-issues-revised-wellness-rules-proposal/\)](#)**

attorney **Kim Shaw Elliott** has been named Partner. Elliott's multi-disciplinary practice includes ERISA, securities law, broker-dealer regulation and tax regulation. Elliott represents broker-dealers, investment advisors, insurance companies and individuals nationwide, with a focus on fiduciary responsibility and best practices.

Sun Life Financial (<https://www.sunlife.com>) announced the completion of its 51% majority stake acquisition of **Crescent Capital Group (<https://www.crescentcap.com/>)**, a global alternative credit investment manager. Crescent has more than 180 partners and employees and approximately US\$29 billion in AUM as of September 30, 2020. It will form part of SLC Management, Sun Life's alternatives asset management business and will retain its leadership, brand, office locations and clients.

The SPARK Institute (<https://www.sparkinstitute.org/>) (Society of Professional Asset Managers and Recordkeepers) announced that **Ralph Ferraro**, Lincoln Financial, has been elected Chair, succeeding Rich Linton, Empower Retirement, who has completed his term as the Chair of SPARK's Governing Board. **Kevin Collins**, T. Rowe Price, has also been elected as Vice Chair. **Rich Linton** will remain as an active member of the board.

Reed Smith (<https://reedsmith.com>) announced the addition of executive compensation partner **Kevin Kay** to its Global Corporate Group in the New York office. Kay's practice includes advising public and private clients on executive compensation and employment and benefit issues, negotiating executive compensation agreements, and counseling issuers and investment banks about ERISA plan assets and other issues.

Pinnacle Actuarial Resources (<https://www.pinnacleactuaries.com>) announced that **Aaron Hillebrandt** has been named a principal and consulting actuary. Hillebrandt joined Pinnacle in 2013 and has been in the property/casualty insurance industry since 2007. He currently serves as director and consulting actuary and as a member of Pinnacle's executive team, leading the firm's marketing function.

Pentegra (<https://www.pentegra.com>) announced that **John M. D'Agostino** has joined the organization as regional director. D'Agostino will focus on expanding Pentegra's qualified plan sales and fiduciary partnerships throughout the Midwest. Most recently, he served as sales partner with Liquid Strategies, an ETF Asset Manager based in Chicago.

PCS Retirement (<https://www.pcs401k.com/>) announced the acquisition of independent recordkeeper **Alliance Benefit Group-Rocky Mountain (ABGRM)**. Together with ABGRM, PCS Retirement partners with financial advisors and TPAs to provide recordkeeping services to over 19,000 plans with 850,000 eligible participants representing over \$26 billion in assets under administration. ABGRM management will join the PCS management team.

Mercer Global Advisors (<https://www.merceradvisors.com>) announced the acquisition of **McGee Wealth Management** located in Portland, Oregon. MWM serves approximately 800 clients with AUM of approximately \$815 million. It was founded by Judith A. McGee, L.H.D., CFP, ChFC joined by her daughter D. Linette Dobbins, CFP. MWM has four shareholders: Judith, Linette, Jennifer Currin Guttridge, CFP, and Sarah Elise Berry, Vice President. In all, 15 MWM team members will join the Mercer Advisors team.

Lockton Dunning Benefits (<https://global.lockton.com/>) has hired **Jason Mahler**, **FSA**, **Travis Brashear**, **JD**, and **Don Harrison**, expanding its growing presence in the Houston market. All three executives will work closely with the firm's clients to

develop data-driven employee benefits strategies. Mahler's role is vice president and team lead; Brashear's role is senior vice president and consultant; and Harrison's role is senior vice president and consultant.

HUB International Limited (<https://www.hubinternational.com>) announced it has acquired the assets of **Garnett Retirement Group**. Garnett Retirement Group manages \$220 million in assets and customized qualified and non-qualified retirement savings solutions and investment advisory and consulting services, with a focus on niche medical practices, in the Southeast U.S. Blanton Garnett, President and Founder, and the entire Garnett Retirement Group team will join Hub Retirement and Private Wealth.

Higginbotham (<https://www.higginbotham.net>) and **Lipscomb & Pitts Insurance** (<https://www.lpinsurance.com>) have combined operations. Lipscomb & Pitts Insurance Co-CEOs Mat Lipscomb III and Johnny Pitts are second-generation majority owners of the firm. Their fathers became business partners in 1954 after working together at Liberty Mutual, and Mat and Johnny assumed leadership in 1990. They will become Managing Partners and will continue leading their existing offices as Lipscomb & Pitts Insurance.

The Health Enhancement Research Organization (HERO) (<https://hero-health.org/>) announced that **Sara Johnson, Ph.D.**, co-president and CEO at Pro-Change Behavior Systems, Inc. assumes the new position of senior research fellow for HERO and **Mary Imboden, Ph.D.**, has been promoted to director of research.

Cigna (<https://www.cigna.com>) and **Evernorth** (<https://www.Evernorth.com>), its health services portfolio brand, made the following appointments:

- **Eric Palmer** was named president and chief operating officer of Evernorth. In this new role, Palmer oversees Evernorth's pharmacy services, care management services and benefit management services.
- **Brian Evanko** was named executive vice president and chief financial officer of Cigna. Evanko assumes leadership for all of Cigna's financial operations and functions, including its investment management and underwriting units.
- **Matt Manders** was named president, government and solutions for Cigna. In addition to oversight of Cigna Solutions, Manders leads Cigna's U.S. government business segment, including all Medicare, Individual, and Medicaid product offerings.
- **Everett Neville** was named executive vice president, strategy and business development. In this new role, Neville will have oversight of Cigna's strategy, corporate development, business development, and Cigna Ventures.
- **Aparna Abburi** was named president, Medicare business. In this role, Abburi continues leading Cigna's Medicare Advantage business, and will also assume oversight of Cigna Supplemental Benefits and Government Pharmacy.
- **Amy Bricker** was named president, Express Scripts business. Bricker's responsibilities expand from leading supply chain and drug procurement, to leadership for all of Evernorth's pharmacy benefit management services.

CFP Board (<https://cfpboard.org>) announced the appointment of **Thomas A. Sporkin** to the newly created position of Managing Director, Enforcement. Sporkin will lead a team of attorneys and legal staff to modernize the detection, investigation and prosecution activities at CFP Board. Sporkin spent 20 years in the Enforcement Division of the Securities and Exchange Commission.

The American Retirement Association (<https://www.usaretirement.org>) announced key reassignments among its senior management team:

- **Allison Wielobob**, General Counsel of the American Retirement Association, will take on the additional role of Executive Director of the Association of Enrolled Actuaries (AEA). She assumes that responsibility from Martin Pippins, who has announced his retirement from the organization.

- **Kelsey N.H. Mayo**, Lead Employee Benefits Attorney at Poyner Spruill LLP will take on Pippins' other role on retainer – that of Director of Regulatory Policy.

Arthur J. Gallagher & Co. (<https://www.ajg.com/>) announced the acquisition of Florida-based **Harden & Associates**. M.C. (Ceree) Harden III and his team will continue to operate from their current locations under the direction of Peter Doyle, head of Gallagher's Southeast region retail property/casualty brokerage operations, and John Tournet, head of Gallagher's Southeast region employee benefit consulting and brokerage operations.

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- **Benefits industry newsmakers: Equitable, Faegre Drinker, Paychex, Pentegra, Wellbeats** (<https://www.benefitspro.com/2020/02/12/benefits-industry-newsmakers-equitable-faegre-drinker-paychex-pentegra-wellbeats/>)

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C.J. Marwitz

C.J. Marwitz is the editor for the retirement industry audience and a digital managing editor at BenefitsPRO. She is currently considering pitches for unpublished contributed content related to the employer-sponsored retirement plan arena. A former technology editor, advertising copywriter, and academic advisor, Marwitz is the mother of three and walker/stick-thrower/treat-giver to a Welsh Corgi named Leeloo.

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