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Benefits industry newsmakers: Adaptation Financial, DMEC, Innovest Portfolio Solutions, PSCA

News from The Wagner Law Group, Ultimate Software, Kronos, Robeco, Premise Health, One80, and more.

By C.J. Marwitz | September 07, 2020



(http://images.benefitspro.com/contrib/content/uploads/sites/412/2020/09/shutterstock_510087124-roundup-news-man.jpg) (Photo: Shutterstock)

Happy Labor Day. Here's the latest news from the employee benefits industry of new hires, promotions, awards, partnerships, and more.

The Wagner Law Group (<https://www.wagnerlawgroup.com/>) announced that seven of its attorneys have been recognized by U.S. News & World Report as Best Lawyers in the area of Employee Benefits (ERISA) Law in the 2021 edition of The Best Lawyers in America:

- Marcia Wagner, the firm's founder and Managing Director
- Thomas E. Clark Jr., Partner and the firm's Chief Operating Officer
- Partners, Dan Brandenburg, Russell Gaudreau, Jr., Israel Goldowitz, Mark Poerio and Roberta Watson.

Ultimate Software (<https://www.ultimatesoftware.com/>) and Kronos Incorporated (https://www.kronos.com/?src=ultimate-legacy&_ga=2.60604718.2042614134.1599247561-404568752.1599247561) announced plans to rebrand the company. The combined company's new name will become UKG (Ultimate Kronos Group) (https://www.ukg.com/?src=kronos-legacy&_ga=2.10369020.815616353.1599239429-796426924.1599239429), effective October 1, 2020.

Robeco (<https://www.robeco.com/us/>) announced that **Maarten Slendebroek** has been appointed Chair of Robeco's Supervisory Board and **Stan Koyanagi** has been appointed a member. Slendebroek is chairman of Mintus and senior advisor of YourArq, both fintech start-ups in London. Koyanagi is a member of the Board of Directors, Managing Executive Officer and Global General Counsel of ORIX Corporation, which he joined in 2013.

Premise Health (<https://www.premisehealth.com/>) announced it has signed a definitive agreement to acquire **CareHere**, which operates wellness centers for self-funded organizations. With the addition of CareHere, Premise Health's annual revenue totals approximately \$1 billion. Premise Health will operate more than 850 onsite and nearsite wellness centers in 300 markets across 45 states and Guam. Effective at close, CareHere will be CareHere, a Premise Health Company.

The Plan Sponsor Council of America (<https://www.pasca.org/2020-401k-day>) has unveiled a new campaign to help plan sponsors educate participants about the importance of making sure their retirement savings take care of their loved ones if they can't – by making sure their beneficiary designations are up to date. The Friday

after Labor Day has been designated **401(k) Day** – a day to focus on retirement planning and preparation. The materials for this year’s celebration are designed to help employers who sponsor retirement plans expand and enhance those programs not just on 401(k) Day, but throughout the year.

One80 Intermediaries (One80) (<https://www.one80intermediaries.com/>) announced that it has acquired the **Equinox Management Group** and its affiliates **Meridian Management Group** and **Co-Ordinated Benefit Plans**. Equinox Management Group Inc., a reinsurance Managing General Underwriter (MGU), was established in 1994 by Suzanne Whalen and Kevin Leys and is headquartered in Oradell, NJ with offices in Clearwater, FL and San Diego, CA.

Innovest Portfolio Solutions (<https://www.innovestinc.com>) announced the addition of two vice presidents: **Steven Fraley, CFA, MBA** and **Dustin Roberts, AIF, QKA**. Fraley will provide consulting services to retirement plans, nonprofits and families. In addition, he will join Innovest’s Investment Committee and Capital Markets Research Group. Roberts is a member of the firm’s Retirement Plan Practice Group, a specialized team that identifies best practices and implements process improvements to maximize efficiencies for our retirement plan clients.

The Disability Management Employer Coalition (DMEC) (<https://www.dmec.org>) and the **Commission for Case Manager Certification (CCMC)** announced an agreement to support and promote professional development opportunities for Associate Disability Management Specialists (ADMS) and Certified Disability Management Specialists (CDMS). DMEC will provide ADMS and CDMS designees pre-approved continuing education opportunities through online and in-person events, including webinars, virtual events, and conferences.

Adaptation Financial (<https://www.adaptfa.com/>) has been formed. It includes a newly registered SEC RIA Adaptation Financial Advisors Inc. The firm will consist of multiple investment entities across the nation. The acquisitions already closed include Rockgate Financial Partners in Dallas, Oklahoma City and Tulsa, Oklahoma; a firm in Columbus, Ohio; a firm in Omaha, Nebraska; Abox Financial in San Antonio; plus additional locations in Houston and Las Vegas. Executive Chairman **Alan P. Niemann, CLU, ChFC, AEP**, is a former OSJ with Royal Alliance and has recently announced his OSJ registration with Cambridge Investment Research. **Kevin V. Cox** is Chief Executive.

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