



## NEWS RELEASE

*For Immediate Release*

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### Soltis Named to PLANADVISER's Top 100 Retirement Plan Advisors List

**ST GEORGE** — Soltis Investment Advisors, a fee-only SEC registered investment advisory firm in St. George, Utah has been recognized among PLANADVISER's Top 100 Retirement Plan Advisors for 2021.

Every year, PLANADVISER magazine names its top standouts from their Retirement Plan Adviser Survey. To be considered for this list, a firm must complete the yearly PLANADVISER Retirement Plan Adviser Survey. Respondents to the survey are categorized for evaluation by the number of advisers and other staff in the firm.

Firms earning recognition are named according to the value and number of qualified plan assets under their advisement. Soltis was recognized under the category of "Small Teams With \$2 Billion or More in Retirement Plan Assets Under Advisement."

"We are glad to be honored by PLANADVISER," said Kim Anderson, AIF®, Managing Partner and CEO/President. "Naturally, we recognize that none of our achievements would have been possible without the trust of our clients. Those relationships are extremely important to us, and we appreciate the opportunity to help them meet their fiduciary responsibilities and retirement goals. Their interests continue to be our highest priority."

In addition to serving as plan fiduciary under ERISA 3(21) and 3(38), Soltis also provides investment management, plan design, plan benchmarking and vendor searches, as well as participant education and communication, advice, financial wellness programs and executive financial planning.

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#### ABOUT SOLTIS

Soltis Investment Advisors, LLC is an SEC registered investment advisory firm based in St. George, Utah. With more than \$5.0 billion in assets under management/assets under advisement, Soltis is one of the largest independently owned and operated wealth management firms in Utah. Soltis provides comprehensive financial planning and investment management services to individuals and families. In addition, the firm offers investment advice and consultation services to retirement plan sponsors (primarily small to medium sized businesses that have experienced a significant level of success). As a fee-only firm, Soltis does not receive any commissions or third-party compensation. The firm's fiduciary status provides a legal framework within which clients enjoy professional financial advice and investment options driven by their best interests, goals and objectives. Soltis has been recognized by the *Financial Times* (top RIA and top Plan Sponsor lists) and *Barron's* (the only Utah independent Registered Investment Advisory firm on the 2015 top independent advisors list). Soltis did not pay any compensation in connection with its inclusion in these recognitions, ranking or awards. Soltis, however, in most cases subsequently purchased marketing materials from the respective award sponsor. The firm, founded in 1993, is one of the few in Utah to have been recognized across multiple rankings in multiple years. At Soltis, the mission is to create, build, and manage wealth so clients are free to pursue life's most important endeavors. For more information, including the selection criteria for the rankings and recognition by the publications mentioned, visit [www.soltisadvisors.com](http://www.soltisadvisors.com).