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Who are the 401(k) Industry's Most Influential?

Influence can flow from the financial resources to buy a competitor or create and market a new product. It can stem from a new idea that is -- or will be -- widely adopted or authoring a piece of legislation that changes the industry. It can also be as simple as holding the respect of one's peers so one's ideas can be widely spread and acted upon.

401kWire's 2007 Fifty Most Influential

Below are listed the 50 top influencers for 2007. The listings were published from December 26, 2006 to January 2, 2007.

Nos. 1-10

1. Fred Reish
2. Shlomo Benartzi
3. Jerome Schlichter
4. David Wray
5. Don Trone
6. Jim Rich
7. Bob Reynolds
8. Dallas Salisbury
9. William Chetney
10. Charlie Nelson

Nos. 21-30

21. James Delaplane
22. Phil Chiricotti
23. Jim Davey
24. George Miller
25. Charlie Ruffel
26. Mike Falcon
26. Cynthia Hayes
27. Theodore Benna
28. Charlie Epstein
29. Francois Gadenne

Nos. 11-20

11. Bob Wuelfing
12. Nevin Adams
13. Steve Saxon
14. Brian Graff
15. John Kim
16. Warren Cormier
17. Bill McNabb
18. Jerry Bramlett
19. Fred Barstein
20. Abigail Johnson

Nos. 31-40

31. Bob Guillocheau
32. Ron Bush
33. Charles Grassley
34. Fielding Miller
35. Tom Loch
36. Joe Ready
37. Vince Giovinazzo
38. Bob Francis
39. Trisha Brambley
40. Jim McCool

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30. Cliff D'Amato
30. John Moody

Nos. 41-50

41. Phil Lussier
42. Kelli Hueler
43. John Carl
44. Dorann Cafaro
45. Karen Kay Barnes
46. Steve Malbasa
47. Scott Peterson
48. Steve Deschenes
49. Ray Martin
50. Alicia H. Munnell

People to Watch

- **Ann Combs**
- **Jerry Golden**
- **Jim McCarthy**
- **Timothy O'Brien**
- **Thomas Schendt**
- **Gene Sperling**

Moved On

- **Ward Armstrong**
- **Walt Bettinger**
- **John Boehner**
- **Ben Cardin**
- **Mike Henkel**
- **Duane Meek**
- **Eliot Spitzer**
- **Charles Vieth**

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Thursday, December 28, 2006

28. Charlie Epstein

By *Sean Hanna*

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28. Charlie Epstein
Founder, The 401k
Coach



As provider turnover among larger plan sponsors has dwindled, providers' attentions have increasingly focused on advisors. That shift is allowing successful advisors to shape providers offerings on behalf of their clients. **Charlie Epstein** is not only a successful advisor, however.

Through his **401(k) Coach** franchise, Epstein is also shaping the retirement advisor community itself. To date, more than 400 advisors have gone through his course. The company's educational

program for advisors and TPAs provides a framework for systematizing a retirement business, sales and marketing processes.

The venture also is helping to form the emerging industry standards that promise to channel the future products and practices of plan providers.

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