

PLANSPONSOR[®]

2027 Plan Sponsor of the Year Nomination Form

PLANSPONSOR is asking for your help identifying plan sponsors that go above and beyond to make retirement income security a reality for employees. Nominations may be made by providers, advisers, consultants, actuaries, attorneys, third-party administrators, employees and colleagues, or plan sponsors can nominate themselves. The award is given in many categories to recognize all plan sizes and types, so any plan sponsor can be eligible.

Please note: We are not accepting nominations for Pooled Employer Plans (PEPs) at this time.

Finalists and winners for Plan Sponsor of the Year awards will be featured online at PLANSPONSOR.com and in upcoming 2027 issues of PLANSPONSOR magazine. Previous Plan Sponsor of the Year winners can be viewed at www.plansponsor.com/awards/.

Award recipients across all categories will be honored at the PLANSPONSOR Excellence in Retirement Awards celebration at the **PLANSPONSOR National Conference on June 6-June 9, 2027**, along with other award winners across the retirement industry.

The deadline for the 2027 Plan Sponsor of the Year awards nominations is **December 24, 2026**. Questions can be directed to awards@issmediasolutions.com. You can preview the nomination form by clicking [here](#).

Q1 Plan Sponsor Nominee Information

☐ Name of the plan sponsor (corporation/locality/nonprofit/etc.) you are nominating. (1) _____

☐ City of the plan sponsor headquarters or where the retirement plan(s) is/are administered. (6) _____

☐ State of the plan sponsor headquarters or where the retirement plan(s) is/are administered. (3) _____

Q2 General Questions Who is the contact at the plan sponsor office? Please note that all nominated plan sponsors will be notified and asked to formally enter the

awards process by completing an online form. (Contact information will not be shared with anyone outside of PLANSPONSOR.)

☐ Plan Sponsor Contact First Name: (1)

☐ Plan Sponsor Contact Last Name: (6)

☐ Plan Sponsor Contact Title: (3)

☐ Plan Sponsor Contact City: (4)

☐ Plan Sponsor Contact State: (7)

☐ Plan Sponsor Contact Email Address: (8)

☐ Plan Sponsor Contact Phone Number (US/Canada or Outside US): (9)

Q3 What is your relationship to the plan sponsor nominated? Please select one.

☐ Employee (1)

☐ Provider (2)

☐ Adviser (3)

☐ Consultant (4)

☐ TPA (5)

☐ Other (6)

Q4 Into what category does the entity you are nominating for Plan Sponsor of the Year fit? (You may select more than one category.)

- ☐ Government defined benefit plan (1)
- ☐ Corporate or nonprofit defined benefit plan (2)
- ☐ Government defined contribution plan (401(k), 403(b), 457, etc.) (3)
- ☐ Nonprofit defined contribution plan (4)
- ☐ Corporate defined contribution plan (5)
- ☐ Employee Stock Ownership Plan (ESOP) (6)
- ☐ Total retirement offering (multiple plans/pre- and post-retirement programs combined together) (7)
- ☐ Multiemployer (Union/Taft-Hartley) Plan (8)
- ☐ Multiple Employer Plan (closed, not a pooled employer plan) (9)

Q5 Why do you believe this plan sponsor should be recognized as PLANSPONSOR's Plan Sponsor of the Year in the category selected? Please include relevant information about plan governance, unique challenges, creative solutions, etc. Provide dates and data where applicable. For the Total Retirement Offering category, please specify how the plans and programs working together provide a more secure retirement for employees.

Q6 May we reference you in contacting the plan sponsor about this nomination?

- ☐ Yes (1)
- ☐ No (2)

Q7 Is there anything else you want the judges to know?

Q8 If you would like to add a supporting document, please upload it here:

Q9: Your Information

☐ Your First Name: (1) _____

☐ Your Last Name: (4) _____

☐ Your Business Title: (2)

☐ Your Firm Name: (3) _____

☐ Your Email Address: (5)

☐ Your City: (6) _____

☐ Your State: (7) _____

☐ Your Phone Number: (US/Canada or Outside US (8)

Thank you for your submission for the 2027 PLANSPONSOR Plan Sponsor of the Year Nomination in the [\\${Q9/ChoiceGroup/SelectedChoices}](#) category.

To submit your nomination, click the blue SUBMIT button below. You will be offered a chance to download a copy of your response for your records after submission. **If you are NOT ready to submit your response**, please exit this form now and return when ready (your data has been saved). Please contact awards@issmediasolutions.com with any questions.