



NEWS RELEASE

For immediate release

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AMERICAN TRUST RETIREMENT NATIONAL “BEST IN CLASS” PLAN; OFFICER EARNS SERVICE STAR

(DUBUQUE, IA) – Each year, *PLANSPONSOR*® Magazine, a leading authority on retirement issues and benefits programs, conducts a nationwide survey to measure retirement plan providers on the quality of the participant and plan sponsor services they provide. Published in November, 2015, by Asset International, Inc., The *PLANSPONSOR* 2015 Defined Contribution (DC) Survey results incorporated the responses of DC retirement plan sponsors from a broad variety of U.S. industries.

Approximately 40,000 survey questionnaires were sent to DC plan sponsors from the magazine database, as well as to client lists supplied by DC providers; 5,100 total usable responses were received by the close of the survey which asked for data points pertaining to each provider’s assets, number of plans and participants in various plan size and type categories, as well as product and service capabilities including participant education.

American Trust Retirement is proud to be:

- The **national number two provider** in the Less Than \$5 Million plan asset market with a net recommendation score of 87.1 percent
- The recipient of **30 total Best in Class Awards** in the Less Than \$5 Million and \$5 to \$25 Million plan assets markets
- Ranked the **national number three provider** for total Best in Class Awards in the Less Than \$5 Million and \$5 to \$25 Million markets
- Ranked in the **top five providers in client satisfaction** in the Less Than \$5 Million market for technology, participant education, plan administration, and account service teams

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- Ranked in the **top five providers for client satisfaction** in the \$5 to \$25 Million market for technology, education, plan administration, and fees and investments

In addition, American Trust Second Vice President **Debra L. Morris** was one of only seven individuals nationally to be recognized with a **2016 Service Star Award** for her professionalism and service to clients. *PLANSPONSOR*® Magazine reviewed approximately 700 surveys to determine the winning consultants.

“Our team of professionals has earned more than 200 *PLANSPONSOR* Best in Class Awards since 2008,” said Kurt Wedewer, American Trust executive vice president and division manager. “This accomplishment is a tribute to our staff and their relentless efforts on behalf of our clients. To have Debra singled out for national recognition is an exceptional honor for her and her colleagues who support her and our entire organization day in and day out.” he added.

Award-winning American Trust Retirement is unique as a discretionary trustee and therefore is able to assume and manage specific responsibilities of retirement plans. “We are proud to have earned a **Best in Class Award for legislative/regulatory updates** to our plan sponsors. As a discretionary trustee, we work hard to reduce sponsors’ potential liability for legal and compliance responsibilities, Internal Revenue Service Regulations, ERISA, Department of Labor regulations, and general trust laws,” Wedewer added.

American Trust Retirement is a division of the American Trust and Savings Bank Financial Management Group whose assets under management now exceeds \$2 billion, and is a subsidiary of ATBancorp, Inc. Headquartered in Iowa, American Trust Retirement has offices in Dubuque, Iowa City, Bettendorf, and West Des Moines. It also offers retirement and wealth management services in San Mateo, California. For more information, visit www.americantrustretirement.com.

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