

FACT SHEET

FINANCIAL ADVISOR
USE ONLY



www.pai.com

401(k) FAST FACTS

FULL-SERVICE OFFERINGS

INNOVATIVE PLAN DESIGN

EMPLOYEE COMMUNICATIONS

ENROLLMENT KITS

INVESTMENTS WITH A RECORD
OF SUCCESS AND SUPPORT
FROM WELL KNOWN FUND
COMPANIES

HIGH-TOUCH CUSTOMER CARE

INTEGRATED WITH PAYROLL



OVERVIEW

WHO WE ARE

PAI provides the financial services industry with retirement plan administration and payroll solutions tailored for small businesses. Servicing over 6,500 employers with \$3.3 billion in assets under administration and supporting over 475,000 employees, PAI provides its services to over 2,500 financial advisors and financial institutions nationwide.

PAI has been successfully servicing the small business industry for over 20 years by making strategic and effective investments in people, technology and processes. PAI takes care of all aspects of client servicing and administration so that you can focus on building profitable relationships.

OUR SOLUTIONS

PLAN ONE®

As low as \$150 per year.

A plan designed for owner-only businesses that allow contributions of up to \$45,000 or \$50,000 (if age 50 or older) per year (for 2007). You have the benefits of a full-service plan that provides you with recordkeeping, compliance and administrative support.

PLAN ONE PLUS®

As low as \$1,250 per year.

A combined 401(k) and defined benefit pension plan designed for owner-only businesses and spouses, if applicable, that enables an annual contribution up to \$250,000.

Ideal for owners that are age 45 or older, have annual compensation greater than \$75,000 per year and want to contribute more than \$45,000 per year or 25% of compensation towards retirement.

PLAN TEN®

As low as \$475 per year.

A safe harbor 401(k) designed plan for companies that have 2-10 total number of employees.

Ideal for replacing SEP and SIMPLE plans and owners that have an individual(k) plan and have hired their first employee.

PLAN MOST®

As low as \$950 per year.

A plan designed for companies that demand a comprehensive 401(k) retirement plan. You can choose from a full range of 401(k) and profit sharing plan features. Some of the more common plans available under the PLAN4MOST program are:

- 401(k)
- 401(k) with an Employer Match
- 401(k) Profit Sharing
- 401(k) Safe Harbor
- Age-Weighted (fund company specific)
- New Comparability (fund company specific)

PLANPAYROLL™

As low as \$44 per month.

An offering that focuses exclusively on the needs of small businesses. PLANPAYROLL provides a simple, convenient and smart way to process payroll and file taxes. Best of all, PLANPAYROLL is fully integrated with the 401(k) solution and will save you valuable time and money.

OVERVIEW

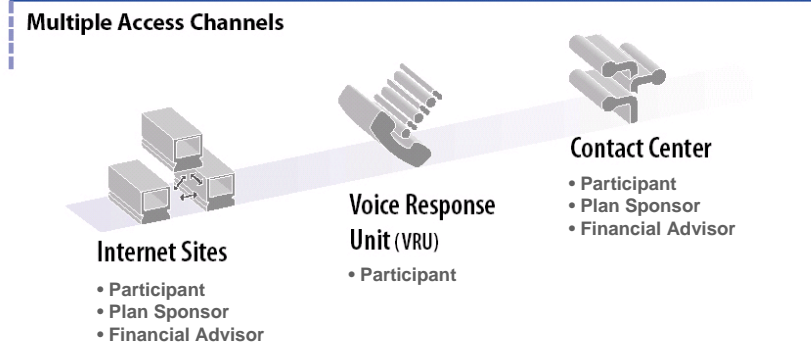


FACT SHEET

OUR SMALL BUSINESS RETIREMENT SOLUTIONS

We provide full-service 401(k) plan administration for small business retirement plans nationwide. We have developed retirement solutions that are segmented to fit the growing needs of small businesses. With PAi on your side, the time your client spends managing their plan is minimized.

We make sure all important parties that are either managing or participating in the plan have access through multiple channels.



Call one of the following fund companies to request a PAi proposal.



800.370.1519	800.421.9900 ext. 3	800.225.6265 ext. 8521	800.826.4600	800.734.5222 option #1	800.787.1621 option #2
PLAN ONE®	PLAN ONE®	PLAN ONE®	PLAN ONE®	PLAN TEN®	PLAN TEN®
PLAN TEN®	PLAN ONE PLUS®	PLAN ONE PLUS®		PLAN MOST®	PLAN MOST®
PLAN MOST®	PLAN TEN®	PLAN TEN®		PLANPAYROLL™	PLANPAYROLL™
PLANPAYROLL™	¹ PLAN MOST®	PLAN MOST®			
	PLANPAYROLL™	PLANPAYROLL™			

¹ Age-Weighted and New Comparability Plans are not available at this time. PAi is not affiliated with the fund companies. PAi provides retirement plan recordkeeping services pursuant to a contractual agreement between the plan sponsor and PAi.



PAi
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