

FACT SHEET

FINANCIAL ADVISOR
USE ONLY



PAi has been honored with several industry awards that include:

- The U.S. Chamber of Commerce Blue Ribbon Small Business Award for 2006 and 2007.
- Ranked as the #6 401(k) Micro Provider for customer service in 2006 by 401kExchange.

PARTNERING WITH PAI

FOCUSED ON SERVICE

PAi delivers more than a typical Third Party Administrator (TPA) – exclusive small business focus and regulatory expertise, behind-the-scenes sales and marketing support and high-touch and high-tech customer care to minimize your post sale involvement and maximize time for winning new business. As your servicing partner, PAi helps you tap into and serve the small business market with a quick-to-market, comprehensive 4-Step program.

STEP

4-STEP PROGRAM

1

ATTRACT AND WIN SMALL BUSINESS CLIENTS

PAi helps you attract new clients by providing prospect qualification criteria, sales collateral and the small business retirement and payroll expertise you need to win new business. PAi's market experts are readily available to answer questions on product design, compliance issues and other topics.

2

EFFORTLESSLY SETUP NEW CLIENTS

PAi provides a streamlined installation process with an automated online setup. We are also available to provide immediate answers to plan design, regulatory, technical or product inquiries you receive from your client.

3

SERVICE SMALL BUSINESS CLIENTS

PAi's full-service support model provides various channels for clients to leverage. Your clients always have access to their account – whether through our easy-to-use web sites, voice response unit (VRU) or knowledgeable contact center. Our web based applications are linked to facilitate communication between parties.

PAi proactively informs you of issues such as failed discrimination tests and keeps you apprised of participant activity through your own financial advisor web site.

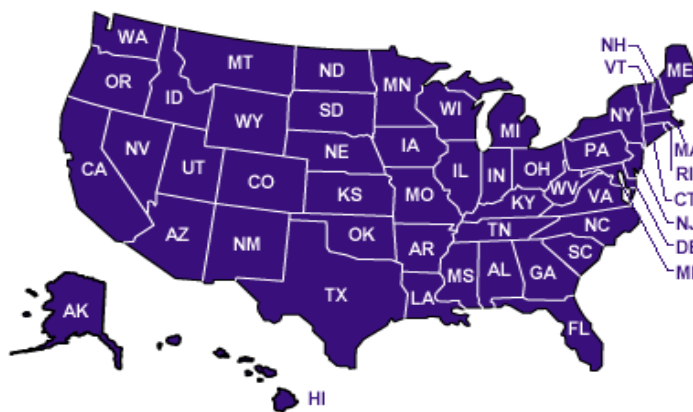
4

RETAIN SMALL BUSINESS CLIENTS

PAi proactively keeps you informed about all aspects of the small business retirement and payroll industry and helps you help your clients make well-informed retirement decisions.

PAi takes the worry out of plan administration and allows you to focus on building profitable relationships and cross-selling other services.

NATIONAL REACH



National coverage

*Servicing
employers in every
state*



2,512
Plans



2,419
Plans



2,752
Plans

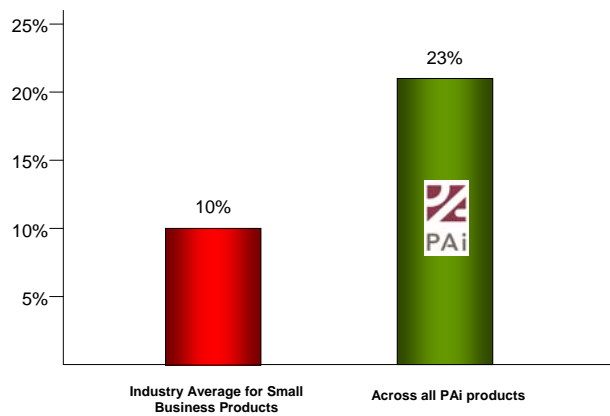


2,317
Plans

PARTNERING WITH PAI

FACT SHEET

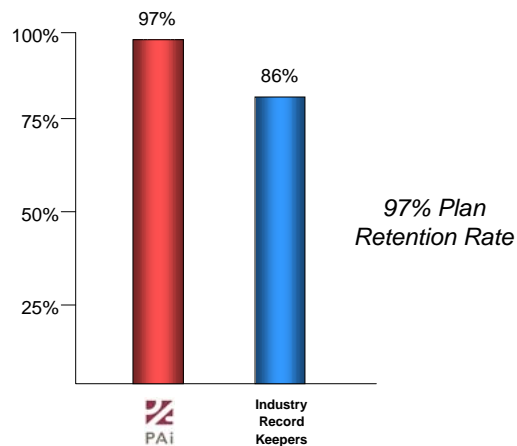
FOCUSED ON RESULTS



PAi's products are very easy to understand, simple to manage and are cost effective. We understand that your client doesn't have a lot of time to become experts in the 401(k) business and that is why we have designed product solutions that fit the needs of the business owner. For 2008, the products averaged a 23% sales closing ratio...try us out and see how these products practically sell themselves.

www.pai.com

At PAi, we are very focused on customer service and we have consistently **achieved a 97% client retention rate** over the last three years. We are committed to providing supreme customer service that will give you the "peace of mind" to spend your valuable time developing new relationships, increasing assets or expanding existing customers.



FOR ADDITIONAL INFORMATION, PLEASE CONTACT PAI AT:

800.236.7400 Option 5

sales@pai.com



The 401(k) offerings are powered by PAi. 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 delivers comprehensive solutions with a small business focus and high-touch and high-tech client care – all at affordable costs.

Version 12152008