



Partnering with PAi

PAi has been honored with a number of industry awards that include:

- Ranked in top five in both small and micro 401(k) provider markets according to 401K Exchange Industry Survey.
- Named a finalist in the seventh annual American Business Awards in the category of Customer Service Department of the Year.
- Received the U.S. Chamber of Commerce Blue Ribbon Award for Small Business for 2006, 2007, 2009, 2010 and 2011.
- Given an A+ rating by the Better Business Bureau (BBB).

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 retirement plan market with a quick-to-market, comprehensive 4 Step program.

STEP

ATTRACT AND WIN SMALL BUSINESS CLIENTS

1

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

EFFORTLESSLY SETUP NEW CLIENTS

2

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

SERVICE SMALL BUSINESS CLIENTS

3

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 or 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.

RETAIN SMALL BUSINESS CLIENTS

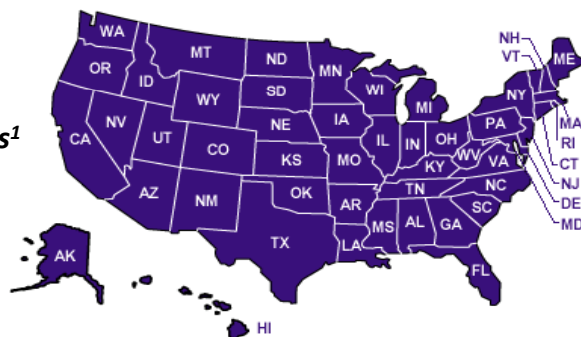
4

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

We take the worry out of plan administration and allow you to focus on building profitable relationships and cross-selling other services.

National coverage

Servicing 13,000 plans¹



3,265 Plans



3,145 Plans



3,578 Plans



3,012 Plans

¹As of November 2009.



Focused on Results

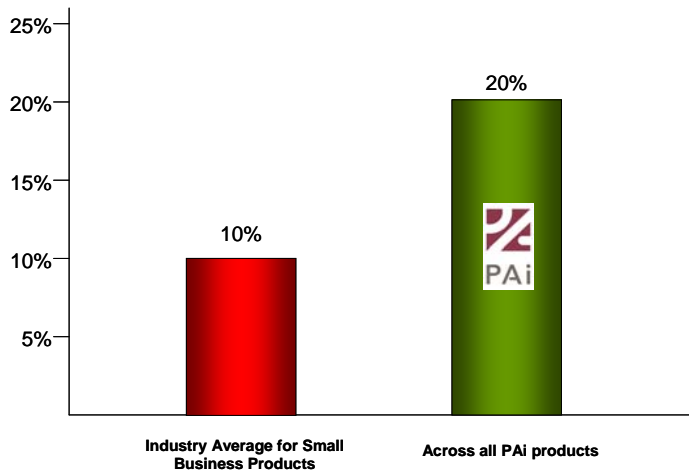
Simple
Easy
Low Cost

To request additional information or receive a proposal:

Contact us at:
800.236.7400 option 1
or
sales@pai.com

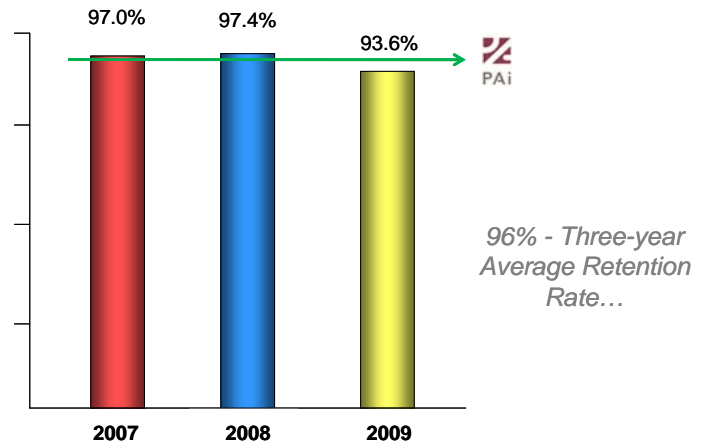
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PAi is a strong believer in building strong corporate culture and set of values that support our business objectives and strategy. It really defines who we are and we take great pride in taking care of clients and helping them provide a retirement offering that will serve the needs of the small business owner and their employees. We are very passionate about what we do and how we serve you and your clients!



The programs offered by PAi are very easy to understand, simple to manage and cost effective. We understand that your client doesn't have a lot of time to become an expert in the 401(k) business and that is why we have designed product solutions that fit the needs of the business owner. For 2009, financial advisors averaged a 20% sales closing ratio when using our solutions...try us out and see how these products practically sell themselves.

At PAi, we are very focused on customer service and have achieved a 96% plan retention rate average over the past 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.



This material is provided for general and educational purposes only, and is not intended to provide legal, tax or investment advice, or for use to avoid penalties that may be imposed under U.S. federal tax laws. Contact your attorney or other advisor regarding your specific legal, investment or tax situation.



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.