

## TESTIMONIAL



### Overview

William Henry Crew has served as an Independent Financial Advisor for over fifteen years providing financial planning and advice. For the past ten years, he has teamed with LPL Financial, William has provided his investment advice and retirement knowledge to an array of business professionals ranging from sole proprietors to small businesses. William is currently servicing over 30 retirement plans.

*“PAi is a one-stop shop for retirement plan administration. PAi’s web site helps me proactively manage my clients as well as my time with just a few clicks of the mouse.”*

William Henry Crew  
President, William Henry Crew III Wealth Management

[www.pai.com](http://www.pai.com)

### Challenge

As a financial advisor, William Henry Crew primarily focuses on providing formal financial planning to all manners of business professionals. A major obstacle William encountered when working with these smaller market clients was finding a cost-effective solution accompanied by an ease of plan administration. Traditionally, these solutions have been difficult to locate for this market.

An additional obstacle has been locating an administrator with an equal balance of experience, customer satisfaction and a customer care center that can answer questions and help his clients over the phone. Most business owners are looking for a retirement plan that is cost effective, fits their business needs, is easy to administer and provides significant value to its employees. According to William, his clients are looking for solutions that are easy to understand and minimize their time and effort in overseeing the plan so the business owner can focus more time on running their business.



## TESTIMONIAL

### Solution

PAi's full-service delivery model and high-touch customer service provided William's clients the support that they were looking for. Assigned installation consultants proactively managed the plan setup and conversion every step of the way and kept the client and William apprised of how the process was proceeding.

PAi's commitment to service, extensive field knowledge, proactive customer support, incorporation of state-of-the-art technology and cost-effective product offerings initially caught William Henry Crew's attention. PAi's informative, responsive and proactive sales and implementation teams quickly won William over.

*"PAi's staff is very knowledgeable and courteous, and their fees are the most competitive I have seen in this industry."*

William Henry Crew  
President, William Henry Crew III Wealth Management  
(These are the views of William Henry Crew III only)

[www.pai.com](http://www.pai.com)

### Results

PAi's steadfast commitment to William Henry Crew III Wealth Management Inc. originated at the executive level with hands-on product and plan design strategies that progressively filtered throughout the entire organization with an easily accessible staff available - well-equipped to answer client questions and assist with product qualification.

William Henry Crew views PAi as much more than a typical, "cookie cutter" TPA. PAi instead represents a business partner who routinely goes the extra mile for its clients by working collaboratively with each and every financial advisor. According to William, "I will use PAi extensively and recommend PAi to all of my colleagues."

Version 07302010

Securities offered through LPL Financial, member FINRA/SIPC

Financial Planning offered through William Henry Crew III Wealth Management Group



PAi  
1300 Enterprise Drive, De Pere, Wisconsin 54115  
800.236.7400 phone 920.337.9978 fax