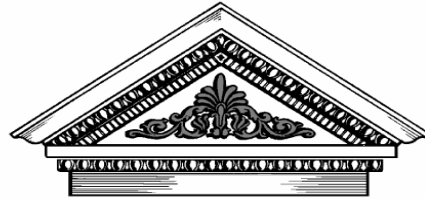


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JMK CONSTRUCTION

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Overview

JMK Construction, Inc. is a residential-specific construction company located in Pacifica, California whose employee base varies from 16 to 20 employees annually. Currently 13 of these 20 employees participate in the company's retirement plan. Providing a valuable company match as well as working with a knowledgeable financial advisor help secure JMK Construction's astounding 80% participation rate.

JMK Construction established their retirement plan with PAi in 2003. PAi's high level of system automation quickly earned JMK's appreciation and respect. Low administration time resulted from this fluid process. Also, the confidentiality of plan information on the web has eliminated concerns among participants regarding access to their investment information.

"PAi's staff delivers a high level of customer service, exhibiting how polite, knowledgeable, honest, and prompt they truly are."

Louise Bagdassari
Office Manager of JMK Construction, Inc.

Challenge

Being in the construction business, JMK recognizes the value of strong customer relationships. JMK needed a 401(k) provider that was going to take care of their employees while at the same time provide the company costs savings and reduce the amount of time in administering the plan. JMK was also very concerned about going through a plan conversion and wanted to make sure that their employees would not be negatively impacted and that the process would go smoothly and not cause a burden on the organization.

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JMK CONSTRUCTION

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Solution

PAi's dedicated installation team established a strong relationship with JMK as soon as the plan was sold by clearly communicating the conversion process and JMK's involvement. Throughout the conversion process, PAi proactively communicated updates and other related information critical to the success of the conversion. PAi's web based plan design and installation application enabled JMK to design a plan that fit their needs and they could always call PAi for guidance and help.

Results

JMK discovered that the PAi's plan implementation process was a breeze. Once they decided on the plan design, no other major decisions needed to be made. PAi worked with the prior provider in making sure the plan assets transferred properly in a timely fashion so that participants were not impacted. The plan is supported by an entirely user friendly system which enables JMK to spend less time managing their retirement plan and more time focusing on their clients. PAi provided the right mix of technology to simplify the plan design and conversion process along with high-touch customer service support to provide timely assistance.

"PAi is courteous and knowledgeable. Their customer service representatives are not afraid to say they do not know an answer and will look into the matter for me. Answers have never taken longer than a business day to be received. I feel very confident in PAi's abilities."

Louise Bagdassari
Office Manager of JMK Construction, Inc.

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