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## *NEWS RELEASE*

### **North Track Funds announces new retirement plan: North Track Plan4One**

*New big company retirement plan and service for owner-only plans at a small company cost*

**Milwaukee, Wisconsin – October 17, 2002** – North Track Funds, Inc. today announced a key addition to the North Track Funds retirement solutions lineup. The North Track Plan4One solution works with any type of owner-only business, including partnerships, S-corps, and C-corps with a 401(k) solution for company owners and their spouses.

An owner-only 401(k) can allow sole-proprietors to put away more tax-deferred retirement money than other types of retirement plans while shielding the plan from creditors should anything happen to the business.

Plan4One has a low annual maintenance fee, online account access and payroll submission as well as loan availability, and the ability to cover multiple owners. “Also unique to our plan is inclusion of signature-ready IRS-required forms (Form 5500) and the ability to convert the plan to a conventional 401(k) if the owner adds employees,” said Scott Stevens, Director of Retirement Services, North Track Funds, Inc. “In addition, two plans will be offered: the NorthTrack Plan4One, which features seven NorthTrack Funds, and the Plan4One Multimanager, which includes North Track funds plus Eaton Vance and AIM funds”.

The solution works as follows:

- **Deferrals:** The participant can defer his or her compensation (earned income, e.g. W-2 income, K-1 income) up to a limit of the lesser of 100% of compensation or \$11,000 (2002) or \$12,000 (2003).

(More)

- Employer profit sharing: The business can contribute up to a limit of the lesser of 25% of compensation or \$40,000.
- Total: The deferral and employer profit sharing total cannot exceed the lesser of 100% of compensation or \$40,000.
- Catch-up: If the participant is 50 or turns 50 in the calendar year, he or she can make an additional \$1,0000 (2002) or \$2,0000 (2003) deferral that is not subject to the total.
- All amounts are 100% vested immediately.

Plan4One is powered by Plan Administrators, Inc.; a retirement plans record keeping and administration strategic partner of North Track Funds.

**About North Track Funds:**

*The North Track Fund line-up consists primarily of enhanced index funds and is sold through financial intermediaries around the country. Distributed by B.C. Ziegler and Company, North Track's assets under management currently total \$1.2 billion. North Track offers four equity index funds (PSE Tech 100 Index Fund, S&P 100 Plus Fund, Dow Jones U.S. Health Care 100 Plus Fund and the Dow Jones U.S. Financial 100 Plus Fund), as well as a mid-cap growth fund (Managed Growth Fund) and three fixed-income funds (Government Fund, Tax-Exempt Fund and Wisconsin Tax-Exempt Fund). North Track funds are available through more than 450 broker/dealers in class A, B, and C Shares as well as at NAV through fee-based accounts.*

*For more complete information, including charges and expenses, obtain a prospectus by contacting your investment consultant, or call 1-800-826-4600, or visit [www.ntfunds.com](http://www.ntfunds.com). Read the prospectus carefully before you send or invest any money. Investment return and principal value will fluctuate with market conditions and you may have a gain or loss when you sell your shares.*

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