

TESTIMONIAL



**Scott &
Stringfellow** Inc.
a BB&T Corporation affiliate

Overview

Scott & Stringfellow is a full-service regional brokerage and investment banking firm with over 250 financial advisors in 41 locations throughout Virginia, North Carolina and South Carolina. Founded in 1893 by Frederic William Scott & Charles S. Stringfellow, Jr., Scott & Stringfellow provides quality customer care to a variety of individual, institutional, corporate and municipal clients. In 1999, Scott & Stringfellow became a part of BB&T Corporation. As a retail brokerage subsidiary, BB&T Corporation ensures Scott & Stringfellow's continued growth which, in turn, results in a broad range of services and resources for both its financial advisors and clients.

"We are extremely pleased with PAi's full-service solutions and attention to customer service. We are able to offer a comprehensive 401(k) program to our small business clients at a 60% reduction in fees compared to other offerings."

Patricia Campbell
Vice President
Manager of Retirement Plan Sales

Challenge

As a broker-dealer, Scott & Stringfellow primarily focuses on providing benefit and retirement plans to small and mid-sized companies. A major obstacle Scott & Stringfellow 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. Regardless of the challenge in front of them, Scott & Stringfellow strives to provide the highest level of service in the industry to their clients.

www.pai.com

Solution

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 Scott & Stringfellow's attention. PAi's informative, responsive and proactive sales and implementation teams quickly won over Scott & Stringfellow, thus directing their block of business toward PAi.

Results

Statistics overwhelmingly indicate that Scott & Stringfellow made the right choice when they decided on PAi. Within the last six months, 8 out of 23 prospect cases have sold, yielding an attractive 35% sales closing ratio. PAi's steadfast commitment to Scott & Stringfellow 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.

According to Patty, "the PAi products sell themselves - the products made available by PAi are branded and packaged in a fashion that make it easy for the financial advisor and employer to understand and see the value and benefits."

Scott & Stringfellow 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.

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