

the 401(k) team @ CAMI

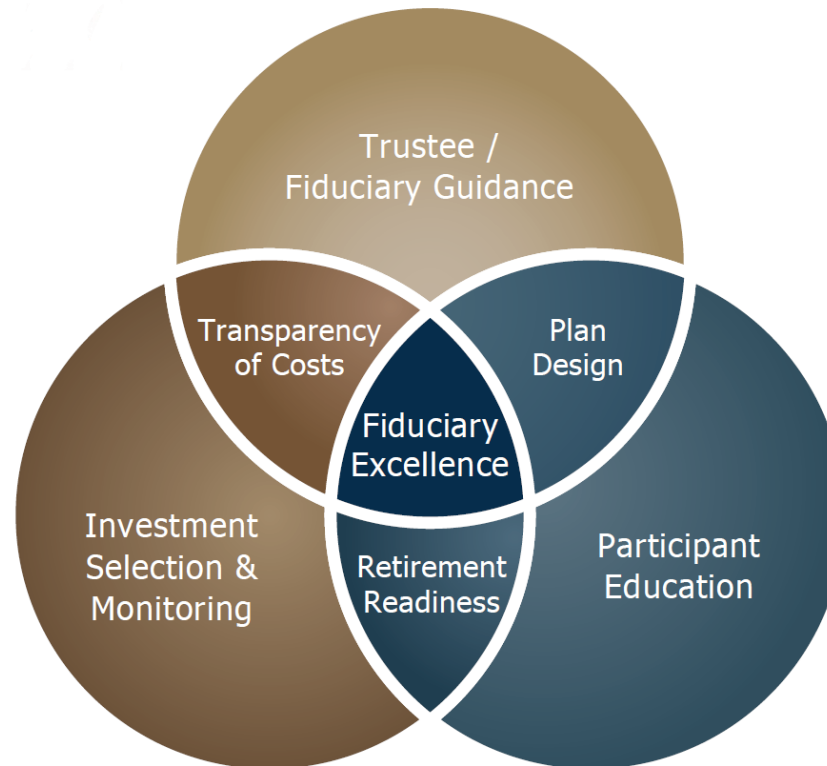


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Experience & Expertise



- Independent consultative approach with over 40 years of combined financial services experience on the team
- Process driven rather than product driven - focused exclusively on the corporate defined contribution marketplace
- Written service agreements including total fee transparency
- Strong fiduciary guidance and support, including a web-based client vault, that documents all decisions made regarding the plan
- The ability and willingness to be a plan fiduciary in writing - Accredited Investment Fiduciary® & CERTIFIED FINANCIAL PLANNER™
- Quality quarterly mutual fund monitoring reports
- Pro-active client service model – leading to a 96% client retention rate dating back to 1996
- Employee education and motivation

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