Your Portal to Improved Client Management.

The PartnerLink Web site is your direct link to all the timesaving and business-building tools needed to effectively manage your clients' retirement plan. PartnerLink is available online 24 hours a day, seven days a week at your convenience.

PartnerLink provides you with real-time plan and participant information and gives you access to numerous valuable reports, including inactive and employee disbursement reports.

Key Features

Plan Information

- Allows you to view plan provisions.

Employee Information

- Allows you to view, add or change participant information.

Plan Summary Statistics

- Get a quick snapshot of your Plan's participant demographics and contribution activities.

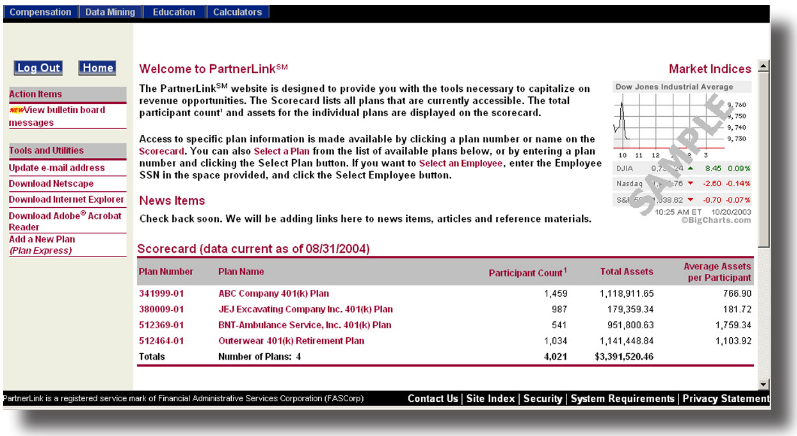
Sales Tools and Reporting

- Includes details about information within each report and helpful hints on usage.
- Use the census file and the participant data file for year-end testing.
- Utilize tools and reports to cross-sell and upsell.

The "To Do List"

A means for you and your clients to track and authorize employee disbursements online.

- Quickly and easily supply missing information to process disbursements.
- Receive daily e-mail notifications about disbursements requiring review.
- Ability to cancel items from the To Do List if a disbursement is requested in error or if the disbursement is not approved.
- Automatic cancellations of outstanding disbursements after 60 days or loans after 15 days.



Key Benefits

- Real time access to data—make informed decisions by having easy access to the most current information.
- Electronic delivery of quarterly and annual reports.
- Electronic data files to facilitate year-end testing and Form 5500 preparation.
- Capitalize on revenue opportunities through easy-to-use prospecting tools and reports.
- Online forms
- Comprehensive education & helpful calculators to share with participants.

Explore PartnerLink today—Your portal to improved client management!