



## ***PRESS INFORMATION***

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### **FOR IMMEDIATE RELEASE**

#### **NEWKIRK/MASTERYPOINT LAUNCH FIDUCIARY MONITORING SERVICE ENABLES ADVISORS TO HELP SPONSORS IN TRACKING INVESTMENT OPTIONS**

ALBANY, NY, October 6, 2008 — Newkirk and its subsidiary MasteryPOINT today jointly announced the availability of Plan Investment Plus (PIP). The new online service enables advisors to assist plan sponsors and their fiduciaries in meeting their obligation to review plan investments.

Among other features, PIP will allow users to:

- Identify standards and criteria on a plan-by-plan basis for purposes of determining whether existing investments remain appropriate.
- Create investment policy statements reflecting the standards and criteria selected.
- Prepare full-color monthly or quarterly monitoring reports, including performance information, for plan sponsors.
- Produce investment committee meeting agendas and minutes for use by investment committees.

“Meeting the fiduciary responsibility for monitoring plan investments is a major concern for both plan sponsors and their advisors,” noted Todd Bloomfield, MasteryPOINT’s president. “PIP provides a tool that helps them satisfy that obligation. Like our guidance and advice applications, our monitoring service affords broad functionality at a very attractive price.”

“Our long-term plan is to integrate Plan Investment Plus into other Newkirk services,” added Pete Newkirk, president of Newkirk. “It won’t be long before we’re able to link PIP to our

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communication platforms and transfer data back and forth. That translates into a significant time savings for users who use both systems. Additionally, we expect to be able to incorporate some of the participant demographic reports we can provide into the PIP service, thereby providing a more comprehensive management report.”

Newkirk/MasteryPOINT will be demonstrating their Plan Investments Plus service at the CFDD Conference in October. Online demonstrations are also available. Interested parties can sign up for such demonstrations through

*<http://www.newkirk.com/OnlineEvt/index.cfm?click=seminars&stype=demos>*.

For more information on Newkirk’s defined contribution services and products, contact Newkirk at 800-525-4237 or visit *[www.newkirk.com](http://www.newkirk.com)*.

### **About Newkirk**

Newkirk and its subsidiary companies are leading-edge defined-contribution plan communication providers. For over 35 years, Newkirk has developed creative solutions to communication issues faced by financial institutions and professional firms focusing on 401(k), 457, 403(b), money purchase and profit sharing plans.

For more information, visit *[www.newkirk.com](http://www.newkirk.com)* or call 800-525-4237.

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