



PRESS INFORMATION

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FOR IMMEDIATE RELEASE

NEWKIRK ANNOUNCES THE CREATION OF PARTICIPANT INVESTOR SERVICES

Company consolidates education and information services under a single brand

ALBANY, NY, November 30, 2004 — Newkirk, a leading financial services information provider, today announced the creation of Newkirk Participant Investor Services (NPIS), a single source retirement plan participant information, education, and advice solution.

Newkirk Participant Investor Services includes investment guidance provided by *GuidancePlus*[™], investment advice offered through *AdvicePlus*, online viewing of mutual fund prospectuses, semi-annual reports and annual reports, and fund data sheets made available through *Newkirk Fund Central*, as well as additional online tools and educational content.

“The services offered as part of Newkirk Participant Investor Services will greatly benefit our clients,” says Pete Newkirk, president of Newkirk. “These services for participants in self-directed retirement plans are highly effective and cost-efficient, and they’re available on an integrated or à la carte basis,” he added.

“We view these services as ancillary to Newkirk’s broader mission of providing effective participant education. Providers are increasingly looking at participant communication and education holistically. Newkirk offers a comprehensive communication solution, of which

the components of NPIS are only a part. Education, guidance, advice, and such other participant communications as prospectuses, confirmations, and the like are more effective if they're part of an integrated system," he continued.

Newkirk Participant Investor Services are integrated within the *NewkirkOne* participant communication platform. *NewkirkOne* effectively uses individualized messaging and message management to move participants down a pathway toward a comfortable retirement. The steps on that pathway include increasing deferrals and improving asset allocation. The NPIS services are one piece in the integrated communication puzzle.

Register today to view an online demonstration of *GuidancePlus* and *AdvicePlus*. To register, please contact Eliot Freeman by phone at 518-862-3317, or by e-mail at efreeman@newkirk.com. To try out Newkirk's guidance, advice, and participant calculator tools, please visit our demo page at www.masterypoint.com.

For information on *Newkirk Fund Central*, please contact Jim Lawler by phone at 518-862-3221, or by e-mail at jlawler@newkirk.com

About Newkirk

For over 30 years, Newkirk has developed creative solutions to communication issues faced by financial institutions, professional firms, and managed care organizations. For more information, visit www.newkirk.com or call 800-525-4237.

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