



## ***PRESS INFORMATION***

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### **FOR IMMEDIATE RELEASE**

#### **NEWKIRK INTRODUCES TWO ALL-NEW RETIREMENT PAYOUT ESTIMATORS PRINTED AND ONLINE VERSIONS AVAILABLE FOR RETIREMENT PLAN PROVIDERS**

ALBANY, NY, July 27, 2004 - Newkirk, a leading financial services application services provider (ASP) and the nation's most experienced provider of enrollment materials, today announced the availability of two all-new Retirement Payout Estimators.

“The Retirement Payout Estimator gives retirement plan providers another tool to help participants understand their future retirement income needs,” said Pete Newkirk, president of Newkirk. “For many years, we’ve offered a Retirement Planning Calculator that demonstrates the benefits of savings. This new calculator will help focus attention on the amount of funds available on a month-to-month basis for withdrawal after retirement.”

The 4” x 9” printed slide calculator version presents two retirement payout scenarios:

**How much can I withdraw?** Individuals can select their projected retirement balance and their number of planned years in retirement, and the calculator will provide the amount of funds available for withdrawal without prematurely exhausting the account (based on one of three rates of return).

**How long will my money last?** This projects the length of time participant retirement income should last - based on the participant's anticipated balance, desired monthly income, and anticipated number of years in retirement. The length of time will vary based upon the rate of return, with three rates provided for illustrative purposes.

The slide calculator is printed in four colors on two sides, and is designed to coordinate with most collateral materials. The printed estimator is available with or without a custom imprint.

The online version of the calculator includes the two scenarios provided by the printed estimator, plus:

**How much money do I need to have at retirement?** Participants will receive a projection of how much money they will need at retirement given their expected needs, anticipated number of years in retirement, anticipated rate of return, and rate of inflation.

The online estimator utilizes software developed by MasteryPOINT Financial Technologies, a subsidiary of Newkirk.

The Retirement Payout Estimators are available now. For more information on the printed or online estimators, and to request a printed sample, please contact Newkirk by phone at 518-862-3226 or by e-mail at [jharris@newkirk.com](mailto:jharris@newkirk.com).

### **About Newkirk**

Newkirk and its subsidiary companies are leading-edge application services providers (ASP). 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](http://www.newkirk.com) or call 800-525-4237.

### **About MasteryPOINT Financial Technologies**

MasteryPOINT Financial Technologies, a division of Newkirk, produces customizable Series 401(k), 403(b), and 457 educational programs, including PC software, web software, employee specific impact statements, and enrollment materials for qualified plans. MasteryPOINT specializes in PC- and web-based software that provides participants with basic education, financial planning tools (including investment direction and advice), and real-time connectivity to their account balances and investment elections. For more information on MasteryPOINT, visit our website at [www.masterypoint.com](http://www.masterypoint.com), or contact Eliot Freeman, CFP, by phone at 518-862-3317 or by e-mail at [efreeman@newkirk.com](mailto:efreeman@newkirk.com).

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