

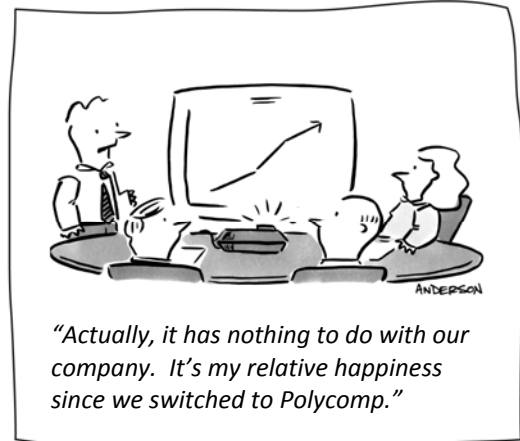


We Deliver Performance

Polycomp Administrative Services, Inc. FAST FACTS

Company

- ✓ Founded in 1974.
- ✓ Privately-held company.
- ✓ California offices in Roseville, Woodland Hills, and San Diego.
- ✓ California-based consulting leader in providing customized retirement program design and administration with personalized service.
- ✓ Administer over 3,300 Self-directed IRA programs.
- ✓ Administer over 1,900 tax-qualified retirement programs including: 401(k), Profit Sharing, Defined Benefit, Cash Balance, ESOP, Prevailing Wage, and 403(b).
- ✓ Administer Association-sponsored Employee Benefit Trusts covering over 11,600 employees.



Employees

- ✓ 130 employees company-wide.
- ✓ 48 credentialed consultants and administrators.

Leadership

- ✓ Donna Harmon is Co-Owner, Director of IRA Operations, President and COO.
- ✓ Ed Dillon is Co-Owner, Director of Sales, and CEO.
- ✓ NaKendra Stewart is Director of Compliance.
- ✓ Jay Kerschner is Director of Qualified Plan Operations.
- ✓ Christopher Mastrianni is Director of Trust Administration.

Northern California

800.952.8800

Southern California (L.A. Area)

800.736.7090

Southern California (San Diego Area)

800.572.4122

www.polycomp.net