



U-Select

A true open architecture investment environment

TRUSTED. PROVEN. ACCOMPLISHED.

OPEN-ARCHITECTURE

U-Select gives you all the features normally available to large plans, plus competitive pricing that allows even the smallest plans to take advantage of the revenue sharing available from many fund companies. We developed U-Select pricing by taking that revenue sharing into account and applying it to create a discounted recordkeeping and administrative fee schedule.



U-Select is a comprehensive retirement program that used for a wide variety of daily-valued, participant-directed defined contribution retirement plans:

- △ 401(k)
- △ 403(b)
- △ 457(b)
- △ Money Purchase
- △ Nonqualified Deferred Compensation
- △ Profit Sharing



For the past four decades, we've been helping plan sponsors and financial advisers create and maintain dynamic retirement programs. Our plan administrators who work with plan sponsors every day average seventeen years in the retirement industry. Our consulting staff works with both the financial adviser and the plan sponsor to design a plan that is on target to meet the objectives of all concerned. Expertise only comes with experience.

Understanding what it means to reduce risk.

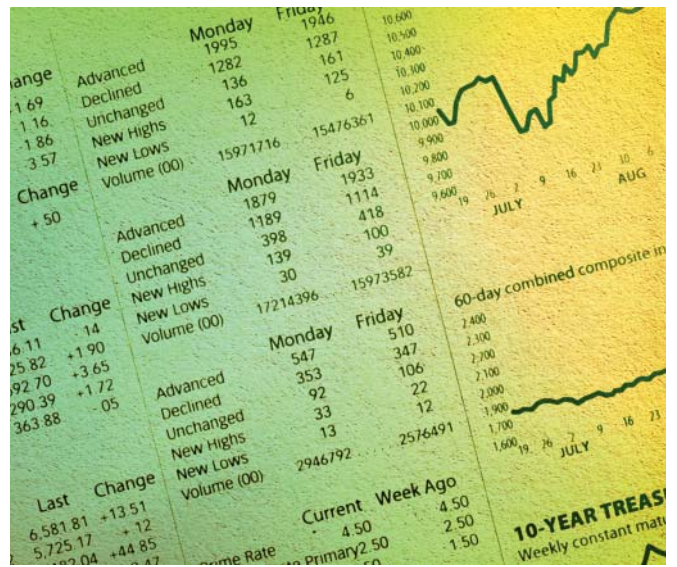
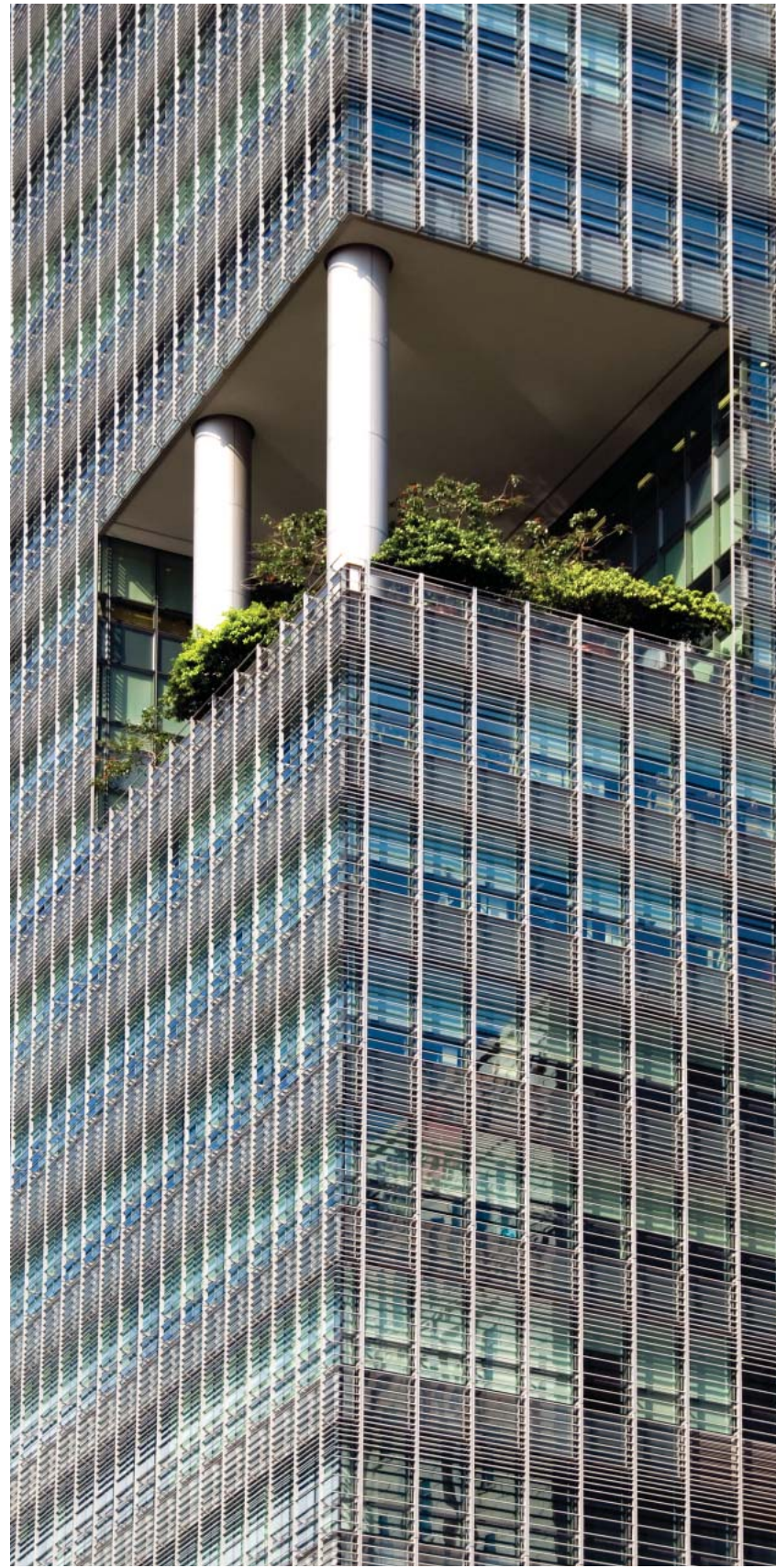
FLEXIBLE

With U-Select you and your financial adviser can design your plan's investment menu using our retail fund family options, even adding nonplatform fund families at your discretion. Any fund available through the National Securities Clearing Corporation's platform can be included in your plan. The U-Select program is so flexible, it can also accommodate:

- △ Frozen assets
- △ Publicly-traded stock, where permitted
- △ Individually directed accounts
- △ Custom-designed asset allocation models
- △ Self-directed brokerage accounts through TD Ameritrade

Flexibility isn't just about options in a plan document. True flexibility is about accommodating the needs of the plan sponsor in working with a financial adviser to design a retirement program that works for the company and its employees. You will find flexibility in every aspect of a successful retirement plan program: from the investments available on the platform to comprehensive education and services to account access, and everything in between.

Putting the “flex” in flexibility.



COMPREHENSIVE

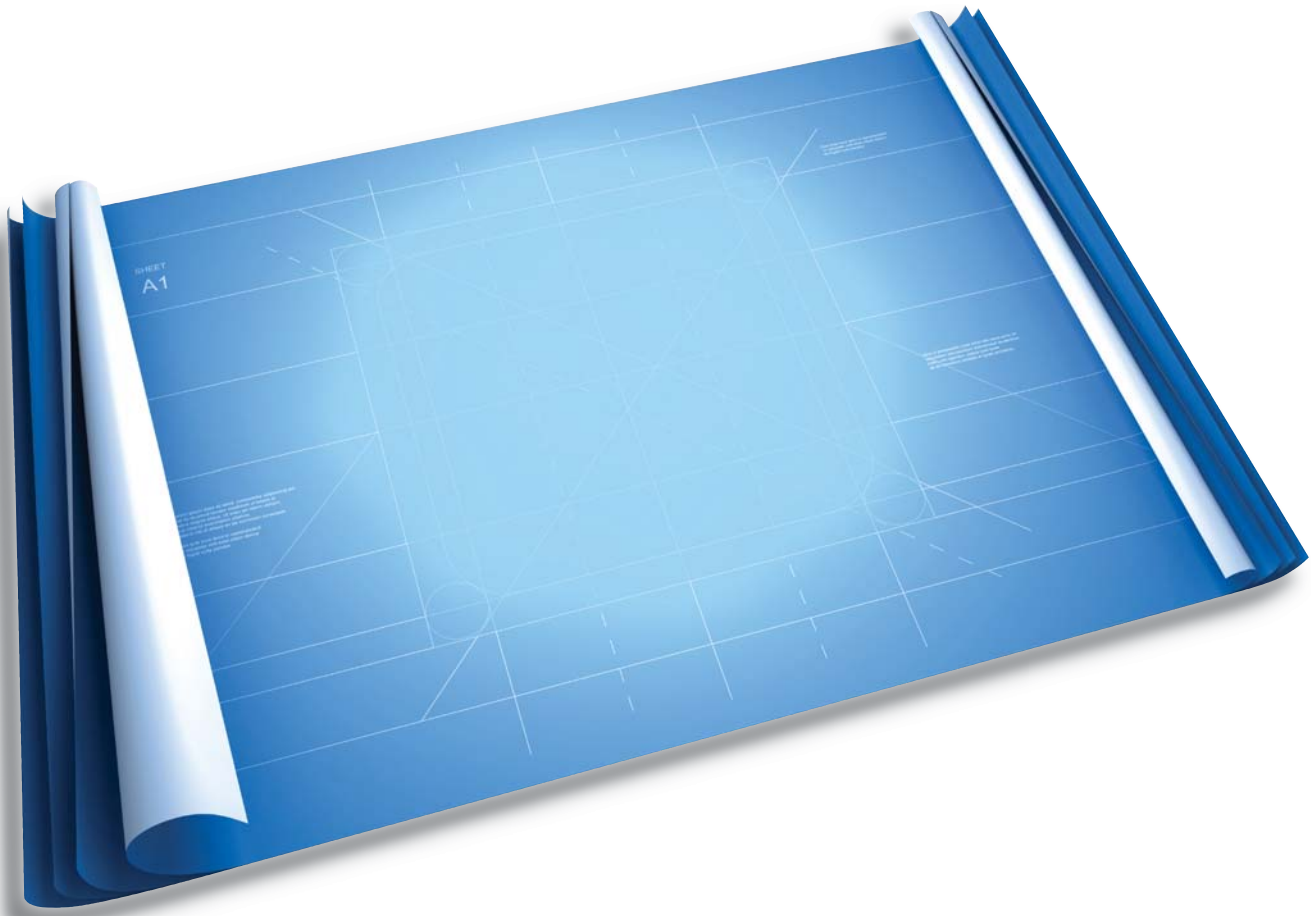
Complete the design of your program with optional services designed to reduce fiduciary liability and keep your plan in compliance.

All retirement plans on our platform are **designed to comply with Section 404(c) of ERISA** unless you provide other instructions.

A co-fiduciary can ease your fiduciary liability as the plan sponsor. Our **Investment Fiduciary Protection Program** provides the co-fiduciary services you need at a price that won't take your breath away!

If your plan has more than 100 participants, a compliance audit must be completed each year and filed with Form 5500. We have partnered with a regional certified public accounting firm, Adams, Brown Beran & Ball, Chtd., to provide **efficient, comprehensive audit services**.

An education program will help your employees understand their retirement plan benefit and increase appreciation and participation. Our Education & Enrollment Services team is available to help you and your financial adviser create and execute a **dynamic employee education program**. Properly documented, a comprehensive and ongoing education program demonstrates yet another way in which you have met your fiduciary obligations to the plan and its participants.



All of the services, all of the bells and whistles, amount to nothing if it's not easy. Easy to set up. Easy to access. Easy to use. And that is our goal in a nutshell: we want to make it easy for plan sponsors and their financial advisers who choose to do business with us.

Making retirement plans easy.

Flexible design, ease of administration, and reduced liability — all provided with expert guidance. U-Select is your answer for a comprehensive defined contribution plan — with the investments you want, to build the retirement program you need. Your CPI representative has the details.

Call today.
800.279.9916 ext. 765



CPI Qualified Plan Consultants, Inc. is a member of CUNA Mutual Group, a leading insurance and financial services organization based in Madison, WI.

Serving your retirement plan needs since 1972.

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