

the
MANDMARBLESTONE Group llc

July 2010

retirement plans redefined

Top 10 Reasons We Love Our Clients!

Summer's a good time to slow down and appreciate what we have to be grateful for.

As we reflect on our 35 year history as a firm, we are proud of the small but important roles we play...

- helping successful businesses gain control over their compensation and tax planning
- rewarding their most important employees within the company's retirement plan
- sleeping peacefully at night knowing that their plans are fully compliant and we will be there to back up our work product if the need ever arose

Survey Says...

We asked our staff to tell us what they appreciate the most about their relationships with our clients and wanted to share that feedback with you! Here's what they said:

Ken Schneider:

- "I appreciate my clients calling to tell me they are thinking of changing investment programs; they know we don't "touch the money" but they know that not all investment programs can work gracefully with MMG as an added specialist. I can give them guidance that will avoid ANY headaches in this transition and make their selection process more efficient."
- "I love when my clients call or e-mail me with updates on their business year; it helps me suggest the best possible contribution and allocation in response to their actual year."
- "Some of my best memories from my 14 years at MMG relate to conversations with clients about life in general, and having nothing to do with the retirement plan! I like being a part of other business stories; it helps me appreciate our own evolution."

Suzanne Grifone:

- "I have the pleasure of working with every new client to the firm; our team handles new plans for their first full year at MMG. I admire how most new clients trust us enough to ask all of their questions rather than make





assumptions. Assumptions can lead to lots of unnecessary work for my team (and extra billing for clients!) and this can be eliminated by having conversations up front.”

- “New clients enter into a relationship with us with a sense of mutual respect; we want to help them experience a smooth transition and they want to be sure to follow our directions in order to be good clients. I appreciate having this as a starting point with each new client.”
- “E-mail makes life so much easier and my ability to “talk” with a new client’s accountant and financial advisor, and to keep them updated on all relevant communications because we can have the “conversation” through e-mail is great! Most new clients feel the same way; I don’t have to interrupt their busy work day with things that do not need their immediate attention.”



Glenn Bowman:

- “In my 13 years with MMG, I am proud of my 99% accuracy rate in my work product; I have clients who tell me they really appreciate my attention to detail and “no nonsense” responses to their questions. I guess it is no surprise that I love how MMG clients are quick to respond to requests and that they care about the accuracy of what they send me...that makes my ability to convert it to an accurate, reliable result much more efficient!”
- “I like the long term relationships I have with our clients; on average MMG is part of a client’s annual strategy for 15 years. It’s great to be a part of how a business grows and changes over time.”
- “I like being able to put client’s minds at ease when they call with worries or anxieties about potential changes to the law...After all, we have 3 ERISA Attorneys on staff I can ask for help!”

And all of our staff agree that the top reason we love our clients is...(drum roll please.....), that *they appreciate our unique approach to retirement plan design and consulting and give us the opportunity to help them create a strategy that works for them personally, and for their businesses, year after year!* After all, that is our core passion and purpose.

Happy summer from all of us at MMG!

We appreciate your business, we value the trust you place in us, and we enjoy being a part of your continued success. Have a wonderful 4th of July!

If you’d like to discuss how we might help you, call or e-mail Bob Mand, Ken Marblestone, Lori Gordon or Ian Haring at MandMarblestone. 215-222-5000, or email us at:

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We also remediate problematic plans to full IRS compliance.

☞☞ You also may reach us through our website: www.mand.com.



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