

Introducing MMG's Case Managers

Dear Friends and Clients,

We hope that this newsletter finds you enjoying the arrival of spring, especially after Philadelphia's very snowy winter!

We'd like to introduce you to the Case Managers of MMG. Too often, we are limited to phone conversations and e-mail, and we wanted to put a "face" with the voice so that you have more knowledge about the people who are dedicated to serving you.

Before we introduce them individually, we thought you would appreciate a few quick facts about our Case Managers as a group:

- Each MMG Case Manager is responsible for between 100 – 250 clients and for leading teams of 4 – 5 people dedicated to responding to each of their clients' needs
- On average, our Case Managers had 11 years of industry experience BEFORE joining our firm, and on average our Case Managers have more than 10 years of experience with our firm
- Each Case Manager is evaluated annually based upon YOUR satisfaction and the accuracy of the work product delivered to you (*please remember to return your client satisfaction survey!*)
- Our Case Managers and their teams maintain a 4.6 out of 5 in client satisfaction ratings, and a 98% accuracy rating in their work product
- Our Case Managers have helped their clients to defer an average of more than \$435,000 each in taxes over the last 10 years



Suzanne Grifone

- As the Leader of our New Plan Implementation Team, Suzanne works with every new MMG client during their first year
- Expecting her first child in September!
- Joined us in 2003



Ken Schneider

- Has been with MMG since 1996
- Loves his dog “Erie”



Glenn Bowman

- With MMG since 1997
- Fleet of mind and foot; ran the “Broad Street Run” in under 65 minutes averaging a pace of under 6 ½ minutes per mile!



Rachel Scheiner

- As the “rookie” of the group, Rachel joined MMG in 2006
- Loves her veggies (one of several MMG vegetarians)
- Engaged to be married this October

We hope you learn something new about those you are working with at MMG...We appreciate your business and your trust in us. We are all proud to play a small, but important, role in the success of each of our clients!

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:

rmand@mand.com, marblestone@mand.com, lgordon@mand.com, iharing@mand.com

We also remediate problematic plans to full IRS compliance.

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

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