

Your Small Business Defined Benefit Plan Experts



Dedicated **DB** Defined Benefit Services

Dedicated to Your Success

Dedicated DB is in business to help financial advisors and tax professionals deliver the powerful tax advantages of defined benefit plans to high-income professionals, the self-employed, and owners of 1 to 5-person companies.

We bring together innovative prospecting tools, expert sales support and high quality after-sale administration services to provide everything you need to feel confident in recommending and retaining small business defined benefit plans. Our goal, simply put, is to strengthen and deepen your client relationships.



Support Every Step of the Way

Dedicated DB's exceptional sales and services staff includes actuarial and legal experts, many with more than 20 years experience. They answer your questions immediately and create custom plan proposals for same-day delivery. Our online calculator creates a prospect-ready proposal and presentation in seconds. We offer web-based and live training, online product information, prospecting tips and scripts to equip advisors and tax professionals with the support they need to close the sale - even advisors who've never sold a defined benefit plan before. Dedicated DB has simplified and streamlined the process from the initial client presentation through plan set-up and annual servicing.



Quality Administration

No need for an advisor to coordinate an actuary, third-party administrator, tax-attorney and CPA. Plan design, administration and client services are part of a single, integrated solution. Dedicated DB keeps on top of pending regulations, informing clients and advisors of any required changes. The advisor is copied on all communications to the client. In addition, Dedicated DB's expert staff can discuss options for combining a 401(k) plan with a DB for added flexibility. Dedicated DB has unlimited capacity for high-volume end of year sales.

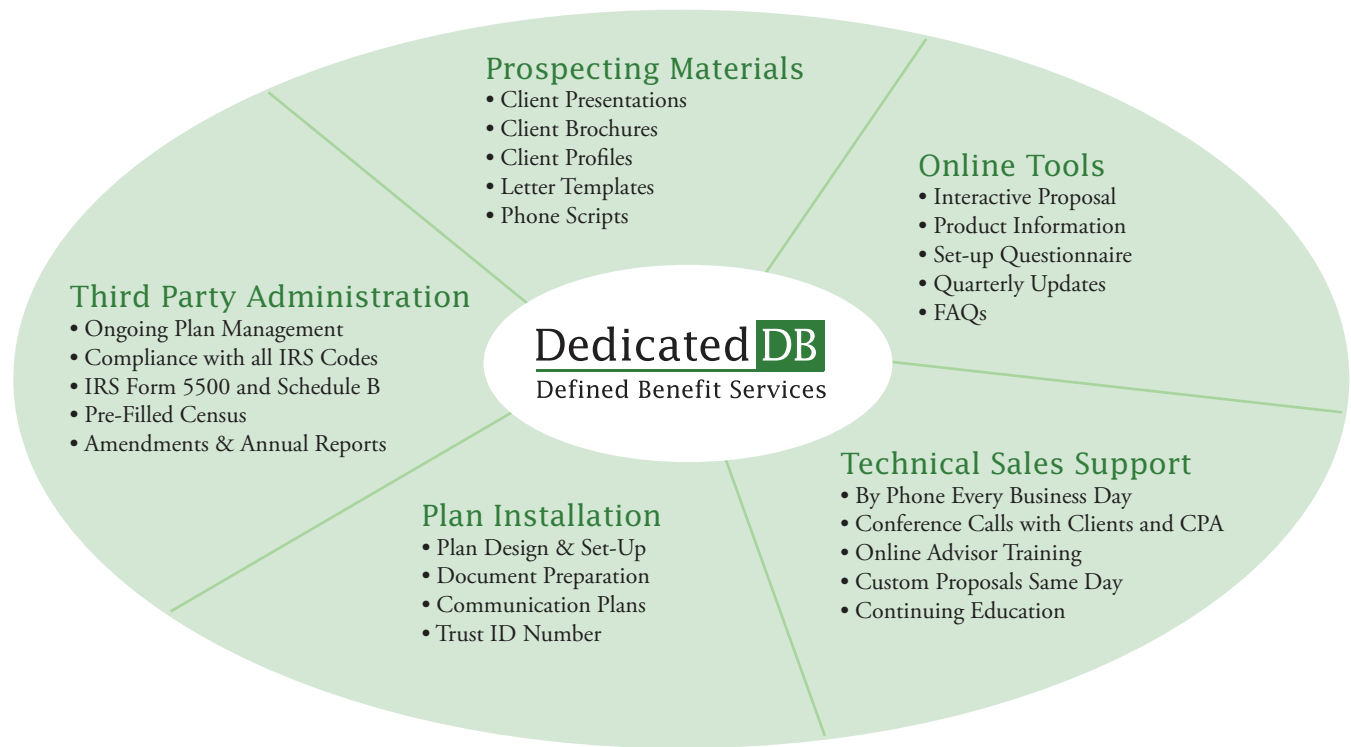


Trusted Partners with Industry Leaders

In addition to the marketing and sales support we provide for independent financial advisors and CPAs, Dedicated DB has partnered with leading financial services companies such as The Hartford, Oppenheimer Funds and Pioneer Investments on their DB products. Dedicated DB works with these alliance partners to create proprietary brands, a customized web site, print collateral, and online sales and prospecting support to create an efficient and effective turn-key program for their Advisors.



Dedicated DB Services and Support



Dedicated DB Management

Karen Shapiro, Chief Executive Officer

Karen Shapiro is a successful entrepreneur and business innovator with 25 years of experience building businesses and marketing financial services. She worked for Bank of America for 18 years, most recently as Senior Vice President and Director of Online Channel Management.



Richard Collins, President

Prior to Dedicated DB, Richard Collins was President of RC & Associates, a consulting firm that worked with pension firms across the US and was President and CEO of Associated Pension Consultants, a top-ranked, third-party administration firm. He is an Accredited Pension Administrator (APA) and former President of the National Institute of Pension Administrators (NIPA).



Art Leaffer, Executive Vice President

Art Leaffer has more than 25 years of experience marketing and developing financial services products. Mr. Leaffer worked as a Director at Charles Schwab and as Vice President at both Bank of America and Wells Fargo Bank. During his career, Mr. Leaffer has led the development and launch of consumer and business retirement programs distributed by banks, brokerages and mutual fund companies.



Dedicated DB
Defined Benefit Services

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Ongoing Plan Management

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New Plan Sales

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