



PRESS RELEASE

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PARTNERS ASCENSUS AND RETIREMENT RESOURCES HELP CLIENT WIN THREE PRESTIGIOUS SIGNATURE AWARDS

Dresher, Pennsylvania – November 12, 2007 – By any measure in the retirement plan industry, a jump from a **53% plan participation rate to a 75% plan participation rate in less than 3 months is a notable achievement.** That is exactly what happened when Ascensus (formerly BISYS Retirement Services) and Retirement Resources joined forces to create and implement a retirement plan for Heritage Valley Health System (Heritage Valley). In fact, the end results were **so impressive that the Profit Sharing/401(k) Council of America presented Heritage Valley with three awards at their 2007 Signature Award competition in the following categories: Increasing Deferrals, Asset Allocation and Conversion (from one provider to another).**

Retirement Resources, the plan's advisor, along with Ascensus, the plan's recordkeeper, were selected by Heritage Valley last October to help turn things around. The situation at the time was challenging: Heritage Valley was in the process of moving away from defined benefit dependence to a plan of shared responsibility, and the organization had a pattern of low and stagnant participation rates. As an additional hurdle, Heritage Valley has a large and diverse employee demographic comprised of approximately 4,000 employees working from over 60 physical locations including hospital departments on round-the-clock schedules. What's more, many employees work flexible and part-time schedules and nearly 1,000 employees earn under \$20,000 annually from Heritage Valley.

"We had to find a cost effective way to connect with all these employees at different times and in different locations with a plan that would respond to their different needs" summed up Jim Phillips, President of Retirement Resources.

Retirement Resources and Ascensus worked with Heritage Valley to create a custom plan solution and to launch an aggressive enrollment and educational campaign designed to break down the normal barriers that keep employees from getting involved. Detailed planning was essential to the campaign's effectiveness, as was thinking "outside the box."

"The idea was to take a multi-channel approach to build momentum throughout our institution—to create a critical mass of enthusiasm, where plan participation would become a normal part of employee life," expressed Les Duncan, Director of New Business Development at Heritage Valley.

To this end, Retirement Resources created a dedicated website portal and delivered PowerPoint presentations, promotional posters, message boards, individualized enrollment books, on-site information sessions, custom-produced DVDs, fliers and newsletters. The repeated message in all the materials was "getting started is easy and really pays off."

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Ascensus committed substantial ERISA resources to Heritage Valley to optimize the plans' design and to accommodate their unique organizational structure. In addition, Ascensus' open architecture investment platform allowed Retirement Resources to build an appealing multi-fund family investment menu that was made accessible to plan participants through an optional, easy to understand, risk-based, Managed Account program. A simple, self-scoring risk profiling tool was built into the enrollment materials to help employees determine whether a conservative, moderate or aggressive approach would be most suitable for them. They then had the option of simply selecting the corresponding Managed Account.

"We know that investment selection is a common stumbling point for would-be plan participants, so we did something about it," said Phillips. "We also know that age and risk tolerance don't always correlate, so this approach is more beneficial for participants and fiduciaries than the omnipresent, age-based target maturity funds."

The success of the campaign is evident in the numbers. Between November 1, 2006 and February 1, 2007, enrollment rates increased by 40.5%; average deferral rates increased from 3.80% to 5.28%, and 70% of the participants opted for the Managed Account program.

"As a result of the campaign, 853 additional employees and their families are now headed for a more secure future," Duncan pointed out.

"The conversion worked because of a total commitment by Heritage Valley, Retirement Resources and Ascensus to achieve measurable improvements in the retirement security of all Heritage Valley employees," added Phillips. "Whatever it takes' was the adopted motto of the conversion team."

"We are excited by the positive response to the plan as well as the Signature Awards recognition. It simply reinforces the notion that there is no substitute for high quality, hands-on service," said Bob Guillocheau, President of Ascensus. "We were not only able to create a plan tailored to the needs of Heritage Valley's business structure, but we were able to convey the importance of retirement planning in a manner that truly resonated with their employees."

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About Ascensus

Ascensus (formerly BISYS Retirement Services) provides high-quality outsourcing solutions for every segment of the retirement marketplace. Programs are tailored to effectively support institutional retirement plan providers and selected intermediaries, facilitating their ability to service their plan sponsor and participant clients. Core offerings cover every component of a sophisticated retirement infrastructure, including administration, recordkeeping, ERISA consulting, distribution support, trust and custody services, training and documentation.

About Retirement Resources

Retirement Resources improves the participation and contribution rates and asset allocations of retirement plans, while helping employers to manage their workload, costs and fiduciary liability. It follows a unique mission-basedSM approach that focuses on enabling each employee, through customized communications campaigns, to achieve a secure retirement at a reasonable age. A prudent process helps employers fulfill their ERISA Duty of Loyalty and Duty of Care by aligning their interests with those of their employees. Retirement Resources is a member of FINRA (formerly NASD) and SIPC and is a Registered Investment Advisor.