



PRESS INFORMATION

Contact: Kassie Scholz
Phone: 518-862-3200
E-mail: kscholz@newkirk.com

FOR IMMEDIATE RELEASE

NEWKIRK LAUNCHES LOW-COST, MULTI-PURPOSE PARTICIPANT COMMUNICATION NEWKIRK SMARTBOOK ENABLES PROVIDERS TO SELECT ENROLLMENT, CONVERSION, AND FEE DISCLOSURE COMPONENTS

ALBANY, NY, October 21, 2009 — Newkirk today announced the availability of the *Newkirk SmartBook*, a communication option designed both to lower provider costs and to satisfy more demanding notice and educational requirements. *SmartBook* allows users to choose from a menu of components. The components include those typically found in enrollment kits (plan highlights, fund data sheets, forms, etc.), as well as those found in conversion communications (blackout dates, investment mapping). In addition, *SmartBook* includes sections that address all facets of fee disclosure (investment, administrative, and individual).

“*SmartBook* basically enables providers to ‘roll their own’ from a communication perspective,” said Peter Newkirk, Newkirk’s President. “Users can create a simple enrollment package or a simple conversion communication. Or they can create more sophisticated combinations, tailored to meet the specific needs of different plan sponsors.”

“*SmartBook* also addresses fee disclosure,” added Newkirk. “While the DOL’s proposed regulations on fee disclosure were never finalized, *SmartBook* incorporates the DOL approach. While Congress is considering disclosure alternatives of its own, we expect many of those requirements to be similar to the DOL’s. We’ll quickly incorporate any disclosures mandated by Congress.”

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“While *SmartBook* satisfies a wide range of communication requirements,” concluded Newkirk, “cost may be the factor that garners the greatest interest among providers. *SmartBook*’s finished size is 5½ x 8½ inches. That allows us both to reduce our production costs and pass the savings along to providers and to secure optimum postage rates where the information is being home-mailed to participants.”

Newkirk has scheduled demonstrations of its *SmartBook* capabilities. Interested parties can sign up at www.newkirk.com/smartbook. Printed samples of various *SmartBook* combinations are also available and may be secured by calling 800-525-4237.

About Newkirk

Newkirk and its subsidiary companies are leading-edge defined contribution plan communication providers. For over 30 years, Newkirk has developed creative solutions to communication issues faced by financial institutions and professional firms focusing on 401(k), 457, 403(b), money purchase, and profit sharing plans. For more information, visit www.newkirk.com or call 800-525-4237.

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