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U.S. Retirement Partners Holds First Meeting of Principals
Firm Points to \$1.8 Billion Already in Assets and 175-Person Advisor Network

ISELIN, N.J., Jan. 14, 2009—U.S. Retirement Partners, a national network of 403(b) benefits administrators, recently held its first meeting of principals to set priorities and share business highlights, such as the accumulation of \$1.8 billion in assets under management and the building of an advisor group that already includes more than 175 professionals.

“It was a terrific meeting. With all these high-level and experienced professionals in one room, we expected a lot in terms of ideas, and I think we got more than we might have imagined. It really underscored the reason why we created U.S. Retirement Partners,” said Robert C. Dughi, USRP Executive Chairman.

The two-day meeting at Disneyworld included all six of the individual regional firms or company groups that have been acquired by USRP so far as well as three more companies in late-stage negotiations to join USRP, one of whom has since joined USRP.

U.S. Retirement Partners (USRP) offers leading 403(b) regional firms a partnership in a national network of providers with access to more advanced administrative products and services, as well as broader best practices expertise and other resources. Regional partner firms are shareholders in the company but continue to operate under their own names and run their businesses.

Early successes of the company have been its ability to build a business that already has \$1.8 billion in assets under administration and to help develop a broad network of 175 advisors to work with the regional firms.

“With our ability at USRP to handle advisor recruiting, we fill a need for the regional firms that just don’t have the time to pursue it,” said Mark M. Skinner, CEO and President of USRP.

USRP, which was only launched last year, has purchased or agreed to purchase firms in Michigan, Florida, Ohio, North Carolina and Utah.

“We have a national presence already, and we are ahead of our business plan projections,” said Dughi.

The agenda for the meeting included discussion of 16 initiatives USRP has under way to support its regional partner companies. The areas included advisor support, 403(b) TPA services, insurance marketing organization services and Special & Final Pay programs.

“We were in essence saying, ‘Here is what we are working on.’ And they gave us feedback and helped us prioritize and set immediate goals,” said Skinner.

One of the group’s primary desires was to focus on an expanded Employee Communication and Education initiative through which advisors could deliver a robust series of educational workshops, he said.

The meeting of the council of regional companies was chaired by Stephen H. Greenberg, founder of the firm bearing his name in Weston, Fla.

About U.S. Retirement Partners, Inc.

U.S. Retirement Partners, with headquarters in Iselin, N.J., was founded to give regional 403(b) providers the scale and capability of a large national firm to succeed in the K-12 marketplace. By joining USRP, partners have the opportunity to grow their businesses with the marketing, distribution and technology of an independent, national firm. For more information please visit www.usretirementpartners.com