

Reprinted with permission from 401kWire.com

Post-Merger, Small-Plan Provider Zooms to the Top of the Rankings

By 401kWire.com

Filed on Monday, August 06, 2007

(401kWire.com) — **UNIFI Companies** is the top-ranked provider in the small-plan category, according to the Mid-Year Provider Ratings released by **401kExchange**. Last year's chart-topper in the \$1 million-\$10 million segment, **Marshall & Ilsley Trust Company**, dropped to second place. The rankings are based on the percentage of clients that gave their providers a rating of 4 (very satisfied) or 5 (excellent). UNIFI, whose retirement plan business is based out of Cincinnati, Ohio and Lincoln, Nebraska, was formed in January 2006 following the merger between Ameritas Acacia Companies and The Union Central Life Insurance Company. UNIFI, unranked last year, was given a rating of 4 or 5 this year by 93.02 percent of its 43 clients who were surveyed. "They're doing pretty good," noted **Fred Barstein**, president and chief executive of Greenacres, Florida-based 401kExchange. **Andrew Powers**, vice president of UNIFI's retirement division, said the firm has 24 retirement plan administrators, the average industry experience of whom is 10 years. In addition, Powers said that there's "a lot of connectivity between our plan administrators and our ERISA plan services group." For its part, Milwaukee-headquartered M&I received high marks from 92.86 percent of the 42 clients who took part in the survey. Taking the third spot is Towson, Maryland-based **CDM Retirement Consultants**, which was given a rating of 4 or 5 by 85.71 percent of its 28 surveyed clients. It was unranked last year. Meanwhile, **CUNA Mutual Life** and **Charles Schwab Corp.** improved their rankings, coming in at fourth and fifth place, respectively. CUNA was ranked ninth last year, while Schwab was ranked tenth. **RSM McGladrey** occupied the sixth spot, with **Standard Insurance Company** (7), **Nicholas Hicks Inc.** (8), **New York Life Retirement Plan Services** (9) and **Mutual of America** (10) rounding out the list.

This story was sent with permission from a copyrighted InvestmentWires' news site. For information on reprints or authorization to resend this story please contact InvestmentWires at 212-331-8999 or use the "Routing List" tool located on InvestmentWires.com.