



# ACI Advisors Corner

## HELP US HELP YOU!

By Tobi Cogswell  
January 5, 2010

Happy New Year! We have been writing the monthly Advisor's Corner for about a year now and we'd love your feedback.

We wanted to provide a writing that would make you smarter, more efficient and a better resource for your clients. Have we helped you with this? What else can we do?

No, this is not fishing for compliments, this is a true request for what you need from us. We will do everything we can do provide that information. Simply respond back to this email and let us know.

There are some areas we can't delve into. You know about money, we know about compliance. We can talk about Qualified Default Investment Alternatives (QDIA) in the broadest sense but can we talk about who, what, how much? That is your area of expertise and we would never attempt to go there.

We always say that Pat writes at 30,000 feet and Tobi writes at ground level; what works for you? We want to make the 2010 Advisor's Corners just exactly how you'd like them.

Your ACI Consulting Team:

Pat Byrnes – President of ACI. Pat comes to work every day wanting to solve problems. He can point you in directions you would never have thought to go, both from a compliance standpoint and in the area of Fiduciary protection. Do you have a medical group client with multiple partners, where everyone wants something different and none of them are talking to each other? Call Pat!

Tobi Cogswell – Director, Consulting Practice. Call Tobi if you have questions about prospects, if you'd like a 5500 reviewed prior to a prospect meeting, if you have a client who needs plan design. Tobi loves mergers & acquisitions and forensic work. Do you have a client who has neglected to file their 5500 for 3 or 5 years? Call Tobi!

Jay Lubert – Senior Consultant. Jay has an incredible ability to listen to you and your prospects, and ask and answer the questions you need to be asking, before you even know what they are. In fact, Jay has a seminar entitled "Questions, Questions, Questions" which he has given to groups of CPA's, both on an internal firm basis and for broad meeting groups. If you have a prospect that needs some plan design, anything from a new 401(k) plan to a complicated cash balance arrangement? Call Jay!

Yariel Chiong – Marketing Manager. Yariel is the one who juggles everything and keeps it all moving. If you want to schedule a seminar, write an article for our Action Items Newsletter, coordinate with Pat, Tobi and Jay on a non-client related project or anything concerning the calendar at all you can be sure we will get Yariel involved.

We are all resources for you in addition to the Administrators who work on existing cases, and even though we've spelled out some specific areas above, we are all available to help you with anything. Let us all work together to make 2010 the best year ever!!

Attached to this email you will also find our 2010 basic training seminar schedule. Please contact Yariel at: [yariel.chiong@acibenefits.com](mailto:yariel.chiong@acibenefits.com) if you are interested in attending one of the upcoming seminars in February.