ThePensionAlliance

Harrisburg - Philadelphia - Baltimore - Boston

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The Pension Alliance of Harrisburg

The Pension Alliance of Delaware Valley

The Pension Alliance of Baltimore

The Pension Alliance of Boston

WHO WE ARE

The Pension Alliance is a professional consulting firm providing retirement planning services to plan sponsors and investment professionals. Our corporate headquarters are located in Harrisburg, Pennsylvania with satellite offices in Philadelphia, Pennsylvania, Baltimore, Maryland and Boston, Massachusetts.

Established in 1988, The Pension Alliance has been providing quality pension design and administration for all types of retirement plans, servicing more than 1000 plans with over $750 million in assets.

In 2002, The Pension Alliance was endorsed by the American Institute of Certified Public Accountants (AICPA) as one of only twenty third party administrators to service their membership retirement plans.

MEETING THE NEED

The Pension Alliance provides plan design, consulting and administrative services for a large variety of employer sponsored plans. Our experienced staff is knowledgeable in the complexities of pension and retirement administration and is supported by a team of expert system professionals. We guide our clients in virtually every aspect of pension plan management.

Not all administrators are alike. Some may differ by size, geographic diversification and technology. At The Pension Alliance, we differentiate ourselves by the helpful attitude of our people, their commitment to customer service and our impeccable quality control.

These common goals allow us to deliver quality consulting and ongoing service to our clients. To further meet the needs of our client base, The Pension Alliance expanded our business model to include three additional offices. These offices, in Philadelphia, Baltimore and Boston, provide additional local contact and a higher level of service for our clients.

ASPPA MEMBER™
WORKING FOR AMERICA'S RETIREMENT

Member of the American Society of Pension Professionals & Actuaries

AICPA

Endorsed by the American Institute of Certified Public Accountants

Retirement Plan Administrators, Consultants and Actuaries

A wholly owned subsidiary of National Investment Managers, Inc.

The Pension Alliance Mission Statement

- We are committed to providing the most effective and innovative consulting services for the development of employee benefit programs.
- We will guide our clients to adopt plans that satisfy their company's goals, not ours.
- We will give honest and straightforward recommendations, drawing from our best knowledge and experience.
- We will provide our clients with the most current legislative information, remain active in our professional associations and meet all continuing education requirements.
- We will give quality and timely service.
- We will adhere to rules of the strictest confidentiality.
- We will charge fair and competitive fees for our services.

Pension Alliance Consultants

Michael S. Ouellette

Michael Ouellette has over twelve years experience in qualified plan sales, design and administration. He currently serves as Regional Director for our New England Region, providing sales support to investment professionals and client service to plan sponsors. Michael received his bachelor's degree in Government Studies from the Harvard University Extension School.

Craig Boynton, QKA

Craig has 20 years of experience in the Retirement Plan industry and has obtained his Qualified 401(k) Administrator (QKA) designation through the American Society of Pension Professionals and Actuaries. Craig received his bachelor's degree in Political Science from Towson State University in 1986. Craig has provided services for retirement plans at all different levels from day to day administration to complex plan design and technical consultation. Craig is the Regional Pension Consultant for the Maryland, Delaware, Northern Virginia and Greater D.C. areas.

Michael V. Primavera, AIF

Michael has over 9 years of experience in the retirement field working in various capacities. He is a graduate of West Chester University and holds the FINRA series 7, 26, 63 and 65 licenses. He has also obtained the Accredited Investment Fiduciary (AIF®) designation in conjunction with the University of Pittsburgh. Michael serves as the Regional Pension Consultant for the Philadelphia area.