

# PFPC Participant Retirement Statement Earns Prestigious Seal of Excellence Award

## 'In many ways, PFPC Established New Standards for Defined Contribution Statement' - 2002 DALBAR Report

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WILMINGTON, Del.

PFPC Inc., a member of The PNC Financial Services Group, Inc. (NYSE: PNC) and the nation's largest full-service mutual fund transfer agent and second largest provider of mutual fund accounting and administrative services, announced today that it has received the DALBAR Seal of Excellence for its new participant retirement statement.

DALBAR, a financial services rating and research firm that serves major institutions in the mutual funds, insurance, retirement plans and brokerage industries, provides extensive benchmark criteria for financial companies to measure the effectiveness of their statements against the backdrop of their industry. DALBAR's report cited the PFPC participant retirement statement as "extraordinarily dynamic, offering unparalleled flexibility in content and design. PFPC leads the industry in ensuring that participants are aware of the resources available when they have questions or need up-to-date account information."

"PFPC is a leading provider of retirement services and we are proud to have received this recognition from DALBAR," stated Thomas W. Holland, senior vice president, retirement services at PFPC. "This initiative was generated by a commitment to our clients to provide the best product offerings available in the marketplace. We have built an exceptionally strong retirement product with advanced personalization, branding and messaging features and capabilities."

PFPC is dedicated to providing the industry expertise, technologies and integrated service platforms that are essential for clients to service and sell across multiple distribution channels and all segments of the retirement marketplace. To ensure success on the design project, PFPC retained Art Plus Technology (APT) to lead the design effort. APT is a recognized strategic consulting firm and has designed the retirement statements ranked #1 and #2 by DALBAR the last two years running. Last month PFPC announced an initiative with Emplanet, Inc. to develop a 401(k) e-solution integrated with WySTAR®, its proprietary recordkeeping technology.

PFPC custom tailors solutions for each client from an array of servicing options to support the growth of the client's assets. The new statement is designed for all PFPC retirement clients, including alliance partners, remote access clients and retail plans. Areas that were emphasized in the design include:

- Educational content on the plan's investment options, financial markets and participant portfolio goals and activity
- Investment planning information and potential action steps for the participant
- Highlights of important contact, account and investment information
- Alerts to impending events that may affect participants
- Account projections based on the participant's specific needs
- Account growth measurement
- Asset allocation including flexible content and age-based allocation models
- Performance benchmarking including personal rate of return and risk measurements

Another primary objective in the PFPC initiative was to create a modular, customizable design format that would allow their clients to select from a choice of design styles to create the feel of a unique design, but also could be personalized to each investor's history and growth.

"PFPC's total commitment to this effort gave us the leeway to do our best work," said Elizabeth Gooding, president and chief executive officer of Art Plus Technology. "We continually strive to raise the bar in investor communications with our content strategies, document designs and technical solutions. The PFPC application is especially sophisticated in that it addresses the communication needs of diverse audiences and incorporates leading edge personalization and customization features. We're very impressed with the investment PFPC has made on behalf of their clients and plan participants and pleased that DALBAR has

recognized this effort with their Seal of Excellence."

#### About Art Plus Technology, Inc.

Established in 1988, Boston-based Art Plus Technology (APT), Inc. is the only independent consulting firm that offers both award-winning document design capabilities as well as expertise in automated document production. APT optimizes printed and electronic communications for clients through the combination of knowledge, creativity, and technology. APT sponsors the annual Financial Communications Forum, which focuses on the latest issues and strategies in printed and electronic financial communications. For more information about Art Plus Technology, please visit <http://www.artplustechnology.com/>.

#### About PFPC

Providing a wide range of global fund services to the investment management industry, PFPC is the nation's largest full-service mutual fund transfer agent and second largest provider of mutual fund accounting services. A member of The PNC Financial Services Group, Inc., PFPC is also a leading provider of retirement services, subaccounting, shareholder services, custody, securities lending, integrated banking transaction services, alternative investment services and advanced output solutions through print mail. PFPC clients comprise some of the world's most successful financial service companies, including brokerage firms, pension and investment managers, insurance companies and banks. For more information about PFPC, please visit <http://www.pfpc.com/>.

#### About PNC Financial Services Group, Inc.

The PNC Financial Services Group, Inc., headquartered in Pittsburgh, is one of the nation's largest diversified financial services organizations, providing regional community banking, corporate banking, real estate finance, asset-based lending, wealth management, asset management and global fund services.

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