



**FOR IMMEDIATE RELEASE**

**November 2, 2009**

For More Information Contact:

Kim DiMaria

EPIC Advisors, Inc.

(585) 232-9060

kdimaria@epic1st.com

Andy Halperin

Mutual of Omaha

(402) 351-2903

andy.halperin@mutualofomaha.com

### **EPIC Advisors, Mutual of Omaha Team Up with Banks to Offer New Retirement Solutions for Commercial Clients**

Banks and trust institutions nationwide now have access to a new retirement platform designed to support their relationship-building efforts with commercial clients. Through an innovative arrangement between EPIC Advisors, Inc. and Mutual of Omaha, banks can enhance their product lineup by adding flexible retirement solutions with the goal of attracting and retaining business clients.

The strategic alliance brings together EPIC's specialized suite of administrative and recordkeeping services for bank-issued retirement plans and Mutual of Omaha's retirement services, including comprehensive fiduciary support, investment options and educational tools.

The resulting retirement platform will allow banks to diversify their product lineup in a cost effective manner, while offering their commercial clients:

- Fiduciary support, including product and investment oversight, plan sponsor guidance and customized advice options for individual plan participants
- A comprehensive lineup of more than 50 investment options, including individually managed accounts, professional asset allocation funds – such as risk-based and target date funds – and self-directed brokerage options
- Customized support through plan design and administration, participant education, recordkeeping, regulatory compliance and ongoing customer service

“We’re pleased to partner with Mutual of Omaha to offer a proven and tested retirement platform for banks nationwide, enabling them to enhance their client relationships with a great retirement plan solution,” said George Curry, Director of Business Development at EPIC. “By combining the strength of the bank’s relationship building skills with EPIC’s award-winning

(more)

recordkeeping services and Mutual of Omaha's robust retirement services platform, we've created a winning trifecta that will help banks continue to develop and grow their non-interest income without making a big investment in people and technology."

**About EPIC Advisors, Inc.**

EPIC Advisors, Inc. is a leading full-service 401(k) plan recordkeeping firm serving financial institutions and small to midsize companies since 1993. Headquartered in downtown Rochester, New York, with 75 full-time employees, EPIC currently serves clients in 33 states comprising over 1,296 retirement plans with 116,000 participants and \$4.58 billion in assets. Robert F. Judd serves as President and James M. Genthner as Executive Vice President. EPIC specializes in participant-directed plans, using daily valuation recordkeeping. For more information about EPIC Advisors, visit [www.epic1st.com](http://www.epic1st.com) and [www.401ktalk.com](http://www.401ktalk.com).

**About Mutual of Omaha**

Founded in 1909, Mutual of Omaha is a full-service, multi-line provider of insurance and financial services products for individuals, businesses and groups throughout the United States. With a client base of nearly 17,000 employer groups nationwide, Mutual of Omaha offers a wide range of plan designs and delivery options for employee benefits, including disability, life, dental, voluntary, special risk and retirement plans. For more information about Mutual of Omaha, visit [www.mutualofomaha.com](http://www.mutualofomaha.com).