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**Local 401(k) Recordkeeping Firm Going Green**  
*- EPIC Advisors, Inc. Initiative Will Help Save Nearly 100 Trees -*

**Rochester, NY** - 'Going Green' is quite the popular trend for 2008. Local 401(k) recordkeeping firm, EPIC Advisors, Inc. is joining that trend by cutting energy costs and the amount of paper it uses on a daily basis. Using estimates developed by Conservatree, EPIC will save approximately 98 trees when all initiatives are implemented.

**“With the amount of paper used in the financial field, we needed to find creative ways to make our company a more environment-friendly business,” says Kim DiMaria, Manager, Marketing and Corporate Communications at EPIC. “EPIC has begun a number of initiatives to reduce power consumption, print production and waste, and consumption of office consumables.”**

One of the early steps was to replace current halogen light bulbs with LED light bulbs, a more efficient form of lighting that uses less energy and offers a longer life. LED bulbs are more expensive to purchase, however EPIC estimates they will save \$1,200 due to lower running costs.

On the print production side, EPIC has implemented the following goals in order to cut down print production and waste:

- Reduce or stop printing research source document that are available electronically
- Scan hard copy documents to electronic media for archiving instead of storing paper
- Review storage processes and procedures to reduce office supply consumption (i.e. paper, folders, storage boxes, printer ink and toner, etc.)

**“Since February, divisions within EPIC have implemented programs that reduced standard manila folder usage by over 3,200 folders annually, eliminated the printing of a daily pricing report saving over 130,000 sheets of printed paper annually,” says DiMaria.**

Earlier this year, the Compliance department came up with their own creative ‘going green’ initiatives. Staff members were equipped with a second computer screen at their desks. This allows them to simultaneously view retirement plan source documents while inputting/validating/running compliance testing on another software application. The new process reduced the print production of retirement plan source documents for over 800 retirement plans, resulting in an estimated reduction of 150,000 printed paper documents.

Also, all retirement plan compliance test results and Form 5500s (Annual Return/Report of Employee Benefit Plan) were produced as PDF documents and delivered electronically to retirement plan sponsors via a secure website. Delivery of testing and 5500s via electronic media for over 800 retirement plans resulted in an estimated reduction of 300,000 pieces of printed paper.

**“Interestingly, as EPIC works to be ecologically responsible, we find that we are saving both soft and hard dollar costs as well in addition to making a positive impact on our environment,” says DiMaria.**

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 60 full-time employees, EPIC currently serves clients in 29 states comprising over 810 retirement plans with \$2.5 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).

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