

## SENIOR STAFF

### **Richard H. Watson, Jr. – President & C.E.O.**

After graduating from Loyola University in 1970, Dick founded Fringe Benefit Administrators, Ltd. (FBA) and has guided it to prominence as one of the largest retirement plan support firms in the South. Dick is an Accredited Pension Representative (APR), a designation conferred by the National Institute of Pension Administrators.

### **Steve Cranfield – Senior Vice President**

Steve came to FBA in 1974 after graduating from the University of Mississippi. He is responsible for the supervision of FBA's plan administrators and works closely with our clients and other professional advisors in the coordination of the day-to-day plan operation. Steve also oversees the operation of Flexateria FBA's cafeteria plan division.

### **J. R. Piper - Vice President**

J.R. joined FBA in 1999 with over 15 years of experience in the Financial Services industry. J.R. graduated from Louisiana State University. He is responsible for supervision of the trading activities with FBA's strategic partners and provides technical staff support.



## WHO TO CALL

To learn more about the services FBA has to offer or to obtain a customized proposal request form, please call, fax or E-mail:

### **RICHARD (DICK) WATSON**

PHONE: (504) 849-1030  
FAX: (504) 835-9296  
E-MAIL: DICK@FBANET.COM

He will be happy to assist you over the phone or schedule an appointment to discuss how FBA can become your . . . . .

### ***Retirement Plan Resource***

Additionally, any member of our senior staff, will be happy to assist you in any way they can.

## **FRINGE BENEFIT ADMINISTRATORS, LTD.**

110 VETERANS MEMORIAL BLVD., SUITE 120  
METAIRIE, LA 70005  
PHONE: (504) 837-9546  
FAX: (504) 835-9296

*Visit our web-site at [www.fbanet.com](http://www.fbanet.com)*



## **FRINGE BENEFIT ADMINISTRATORS, LTD.**

*Founded 1972*

***Your Retirement Plan Resource***



## **Introduction**

For more than 35 years, Fringe Benefit Administrators, Ltd. (FBA) has provided innovative and comprehensive retirement plan services to businesses and investment professionals across the country.

FBA, one of the largest independent Third Party Administration (TPA) firms in the South, has a staff of over 30 members, with an average of 15 years of industry experience. FBA currently provides plan services to 600+ clients throughout 15+ states.

FBA offers you the maximum *flexibility* for your retirement plan. FBA's strength has and will continue to be our client-oriented staff and the partnership we build with our strategic alliance partners. By combining experienced professional organizations, in distinct inter-related disciplines, clients are provided with an "*alliance of strengths*", resulting in a seamless, flexible and comprehensive service package, including:

- ◆ Plan Design & Implementation
- ◆ Education & Enrollment
- ◆ Recordkeeping & Compliance
- ◆ Investment Options
- ◆ Custodial & Trustee Service

FBA's specialty is integrating state-of-the-art technology and industry expertise with market leading trustee, trading and investment services.

FBA's high level of service is targeted to a company's size, service needs and budget. Our plan service teams provide a coordinated package of retirement plan services, with the ultimate goal of keeping your plan running smoothly and efficiently.

Whether your plan is a 401(K), Profit Sharing, Money Purchase or Cafeteria (Section 125) Plan, FBA can be of service to you!



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Member Firm, National Institute Of Pension Administrators

## **PLAN SERVICES**

### **Plan Design & Implementation**

- Flexible Plan Design Alternatives
- IRS Pre-Approved Plan Documents & Summary Plan Description (SPD)
- Client Administrative Manual
- Installation / Conversion Support

### **Education & Enrollment**

- Customized Enrollment Materials
- On Site Enrollment Meetings
- Quarterly Newsletters & Statements
- Investment Guidance Services

### **Recordkeeping & Compliance**

- State-of-the-art Record-Keeping  
Daily Valuation, Unit or Balance Forward
- Timely, Consolidated Quarterly  
Participant Statements
- Employer Reports (available on CD-ROM)
- Compliance & Coverage Testing
- Government Reporting Form 5500 & SAR

### **Participant & Company Account Access Systems**

- *INVEST*-Net / *INVEST*-Tel  
Participant Plan WebSite  
Internet WebSite & 800 Telephone Access
- *INVEST*-Plan  
Plan Sponsor & Advisor Plan WebSite

### **Investment Options, Trading & Trustee Services**

- Complete Array of Investment Options
- Self Directed Brokerage Accounts (Optional)
- "*Lifestyle*" Model Portfolios (Optional)
- Direct Mutual Fund Trading Link (NSCC)
- Complete Trustee / Custodial Services