

401k Plan Lead Sheet

Date: **02/07/2009**

TSR Name: **Chuck**

TSR ID **SMI**

Spoke To: **Sarah**

Simpson

Position: **Personal Assist.**

Business Name: **Paul E. Medusa Md Pa**

Address: **Po Box 2706**

City: **Dunedin**

State: **FL**

Zip Code: **35497**

Phone Number: **(727) 732-9158**

1) Present 401k Plan: **Fidelity Financial**

2) When the Present Plan was initiated: **about 5 years**

3) He/she knows who presently Adminstrators the 401k Plan:

Company administering the 401k plan:

4) What the Adminstrator does best: **They keep us up on performance**

5) The Adminstrator can improve: **helping us understand investments**

6) Last time 401k plan was Evaluated for price or administration: **a few years ago**

7) On a scale of 1 to 10 (10 being the best) Rate:

Your 401k Plan: **Five**

Your Plan Administator: **Six**

8) Number of Company Employees: **56**

Contact's Gender **Female**

9) Wants: To hear about your 401k plans: **Yes**

To hear about lowering 401k costs: **Yes**

To hear about improving service on the plan: **Yes**

The local Retirement Plan Consultant, **Josh Vilardi**

, has permission to call.

The best time to call is: **Busy - said to leave a message or keep calling**

Special Notes: **Sarah said she is very difficult to get ahold of so just keep trying. She feels they have not done a good job in knowing about 401(k) options which are available and how they compare with their present plan. She is looking forward to hearing from you shortly.**

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