



THE PT SERVICES GROUP®
BUSINESS INTELLIGENCE REPORT

401(K) & QUALIFIED PLANS

Lead Number: 12-1234 **Date:** March 19th

Contact Data

Decision Maker: Marianne Fordbere **Phone:** 814-555-1212
Title: CEO **Email:** mfordbere@collinsfactor.com

Company Data

Company Name: Collins Factor **Address:** 148 West High Street
Year Started: 1973
Number of Employees: 400 **City:** Dubois
Website: www.collinsfactor.com **State:** PA
Type of Business: Management **Zip:** 15895
County: Blair

Lead Detail

Plan Asset Size \$10,000,000
Participating Employees: 185
Eligible Employees: 350
Plan Provider SCI
Tenure With Provider Four Years
Plan Advisor SCI
Third Party Administrator LBS Asset Management
Plan Decision Markers Jack Gross, David Matties, Marilyn Smith
Greatest Concern: Compliance