

Attachment 4: Business References

Client name:	Commonwealth of Massachusetts
Client assets:	\$9.5 billion
Contact name & title:	David Lynch, Executive Director
Contact number:	617-367-3900 ext. 320
E-mail address:	david.p.lynch@state.ma.us
Address:	1 Ashburton Place, 12th Floor Boston, Massachusetts 02108
Plan type(s) and recordkeeping services inception date(s):	457(b) and 401(k), January 2008
Total plan size/total participants:	100,216 participants

Client name:	State of Alaska
Client assets:	\$6.9 billion
Contact name & title:	Kathy Lea, Deputy Director
Contact number:	907-465-3226
E-mail address:	kathy.lea@alaska.gov
Address:	PO Box 110203 6th Floor State Office Building Juneau, Alaska 99811-0203
Plan type(s) and recordkeeping services inception date(s):	403(b), 401(a) and 457(b), January 1986
Total plan size/total participants:	107,591 participants

Client name:	County of Orange, CA
Client assets:	\$2.3 billion
Contact name & title:	Duane Bankey, Executive Director
Contact number:	714-834-2081
E-mail address:	duane.bankey@ocgov.com
Address:	333 W. Santa Ana Blvd, First Floor Room 137 Santa Ana, CA 92701
Plan type(s) and recordkeeping services inception date(s):	401(a) and 457(b), December 2001
Total plan size/total participants:	18,884 participants

Client name:	Jefferson County Public Schools
Client assets:	\$205 million
Contact name & title:	Melissa Ekback, Senior Manager, Employee Benefits
Contact number:	303-982-6527
E-mail address:	Melissa.ekback@jeffco.k12.co.us
Address:	1829 Denver West Drive Building 27 Golden, CO 80401
Plan type(s) and recordkeeping services inception date(s):	457(b) and 403(b), January 2007
Total plan size/total participants:	4,751 participants