



CONSULTING GROUP

# USI CONSULTING GROUP

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**FOR IMMEDIATE RELEASE**

## USI Consulting Group Launches Life Income Strategy with MAF Companies *Press Release*

May 1, 2015 GLASTONBURY, CT — USI Consulting Group, one of the nation’s largest retirement and benefit consulting firms, announced today that it is now offering tax advantaged retirement income products which include Life Income Strategy through MAF Companies, a premier national distributor of life insurance and financial services. USI Consulting Group has been offering retirement plan advice, consulting and administrative services to over 700 retirement plan sponsor clients and 350,000 participants since 1975. The addition of Life Income Strategy helps highly compensated plan participants improve their retirement income planning by providing a tax advantaged distribution solution for qualifying participants who want to grow and protect their retirement account *insuring that future market reversals will not affect their savings. Also, for the first time, plan participants can elect to receive income distributions unimpaired by income taxes.* Taxes are paid...but do not impact personal revenue. Developing a tax- advantaged retirement income stream by using these Life Income Strategy strategies and products to meet retirement income needs is key to a successful retirement. The Life Income Strategy program is intended to provide advanced planning, personalized support, customized solutions and access to leading financial products to address the lifetime income needs of retiring participants.

“USI Consulting Group is known for providing valuable and cost-effective solutions for retirement plan sponsors and employees. As employees approach their retirement phase it is important to begin the planning process early. The Life Income Strategy service will provide personal consultation with a retirement planning expert and assist with selecting a solution that fits the employee’s needs. I am very excited about expanding the USI partnership with MAF Companies. Together we can provide customized solutions to any employee’s retirement planning needs,” said Chris Martin, Senior Vice President of USI Consulting Group.

With Life Income Strategy, participants receive a personalized retirement distribution strategy, including a retirement income needs assessment, recommended growth products which limit market risk and development of a tax advantaged retirement income stream using the Life Income Strategy products available through MAF Companies. This service is available to all highly compensated participants who participate in the Direct Solutions® program for defined contribution plan service and wish to limit their tax liability upon distribution. USI Consulting Group and MAF Companies will be hosting a webcast on May 21, 2015 at 10 AM to provide more details on how this program delivers customized solutions for participants. Plan sponsors are encouraged to attend to learn more about advantages of Life Income Strategy.

Direct Solutions® is a bundled service program arrangement that provides independent investment advisory services, comprehensive communication and employee education programs, cost-effective administration and compliance services all delivered by a dedicated service team of professionals at USI Consulting Group. Retiring participants will also benefit from the professional income planning, and expert assistance in product selection from a diverse menu of competitively priced Life Income Strategy products provided by MAF Companies. If you are a plan sponsor who would like more information on this exciting new program please check out the website at [www.usicg.com](http://www.usicg.com) or contact Chris Martin at 860.368.2935.

#### About USI Consulting Group

USI Consulting Group is one of the nation's largest retirement and benefit consulting and administration firms servicing mid-sized organizations and is a wholly-owned subsidiary of USI Insurance Services, the 3rd largest privately-held insurance broker<sup>1</sup> in the United States and 13th largest<sup>2</sup> insurance brokerage firm in the world. Additional information may be found at [www.usicg.com](http://www.usicg.com).

#### About MAF Companies, Inc.

Founded in 1967, MAF Companies has grown into a national marketing organization with annual double digit growth. They have become one of the financial consulting organizations in the industry. MAF Companies supports independent advisors who serve individuals and corporations in the areas of consulting and marketing. They specialize in the design and development of wealth accumulation planning and risk transfer solutions. Its principals have an average of over 30 years experience helping employers address the benefit needs of their most valuable employees. They have held senior roles with some of the country's leading consulting and financial services firms, and bring the knowledge gained from those experiences to the design of innovative benefit solutions for their clients.

<sup>1</sup> *Business Insurance Largest Privately Owned Brokers, July 21, 2014*

<sup>2</sup> *Best's Review's Leader Issue July 2014, Top Global Insurance Brokers Ranking*