



## ***PRESS INFORMATION***

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### **FOR IMMEDIATE RELEASE**

#### **NEWKIRK OFFERS ROTH CONVERSION MATERIALS**

Booklet, online analyzer, and online education seminar address new 2010 Roth Conversion rules.

ALBANY, NY, October 1, 2009 — Newkirk, a leading provider of communication solutions for the financial services industry, today announced the availability of Roth IRA Conversion education materials that summarize the provisions and impact of converting traditional IRAs to Roth IRAs in 2010 and beyond.

The ability to convert to a Roth IRA as of 2010 opens new doors for those who, prior to 2010, were prohibited from making a Roth Conversion because of the annual income limitation. “We recognize that our customers need to accurately relay to their clients the facts and possible benefits of pursuing a Roth IRA Conversion, so we’ve responded with a variety of materials and formats to cover all the bases,” said Pete Newkirk, President of Newkirk. “This is a nice opportunity for financial professionals to offer higher income clients new and favorable money-saving options, especially with the potential advantage of spreading income-tax consequences over two years,” added Newkirk.

Newkirk’s *Roth Conversions: A Closer Look* printed booklet and HTML version have been developed in a question-and-answer format for an easy-to-read, comprehensive review of the opportunity presented. Financial advisors can easily relay the Roth Conversion details to their clients in person through hand outs, via mail or e-mail, or by posting on their website. For seminar settings, a Microsoft® PowerPoint® presentation with a script is also available.

“We’ve rounded out our suite of materials with more technical products created by our subsidiaries, MasteryPOINT Financial Technologies and McKay Hochman Co., Inc.,”

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continued Newkirk. “The online analyzer created by MasteryPOINT allows users to compare the tax consequences of converting to a Roth IRA in 2010 and in subsequent years. For financial professionals looking for more details, as well as possible continuing education credit, McKay Hochman’s retirement education experts are hosting online seminars on Roth Conversions, beginning in November.”

For more information about the Roth Conversion materials, contact Newkirk’s call center at 800-525-4237, e-mail [info@newkirk.com](mailto:info@newkirk.com) or visit [www.newkirk.com](http://www.newkirk.com).

### **About Newkirk**

Newkirk and its subsidiary companies are leading-edge defined contribution plan communication providers. For over 35 years, Newkirk has developed creative solutions to communication issues faced by financial institutions and professional firms focusing on 401(k), 457, 403(b), money purchase, and profit sharing plans. For more information, visit [www.newkirk.com](http://www.newkirk.com).

### **About MasteryPOINT Financial Technologies**

MasteryPOINT Financial Technologies, a division of Newkirk, produces customizable Series 401(k), 403(b), and 457 educational programs, including PC software, web software, employee-specific impact statements, and enrollment materials for qualified plans. MasteryPOINT specializes in PC and web-based software that provides participants with financial planning tools (including investment direction and advice) and real-time connectivity to their account balances and investment elections. For more information, visit: [www.masterypoint.com](http://www.masterypoint.com).

### **About McKay Hochman Co., Inc.**

McKay Hochman Co., Inc. (MHCO), a division of Newkirk, is one of America's most respected and recognized consulting firms serving the employee benefits field. Since 1979, the firm has built its reputation as an innovator in developing unique products and technical services to help clients establish and administer IRS-approved retirement plans. In addition, MHCO has created a niche as an expert prototype plan mass submitter serving financial institutions, attorneys, accountants, and consultants from coast to coast. For more information, visit: [www.mhco.com](http://www.mhco.com).

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