

FOR IMMEDIATE RELEASE  
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**First Mercantile Introduces  
New Retirement Plan Sales Proposal**

(Memphis, Tenn.) – First Mercantile announced today the introduction of a new and improved retirement plan sales proposal that further supports investment professionals’ efforts to grow their business. The new, streamlined proposal highlights information that is important to both investment professionals and plan sponsors in a clear, concise manner.

“Based on client feedback, we have enhanced communications to be more user-friendly,” said Ian Sheridan, president and CEO of First Mercantile. “We are confident that our new, easy-to-use proposal will help investment professionals create points of differentiation for their delivery of First Mercantile’s products and services to their clients.”

The proposal also focuses on First Mercantile's distinguishing features, including:

- The benefits of collective investment trusts - unique investment vehicles that include a full array of institutional money managers, mutual funds, exchange traded funds, lifestyle and custom models, with no proprietary requirements
- First Mercantile's investment-level fiduciary status for the collective investment trusts
- The importance of fee transparency with an itemized Fee Summary Report (by provider, investment professional, third-party administrator (TPA) as well as optional services)
- The value of First Mercantile’s dedicated service teams

“Several versions of the proposal are available to satisfy the different needs of investment professionals. The proposal can feature custom models as an option or highlight the TPA providing administrative consulting services,” said Stan Label, vice president and national sales manager.

Investment professionals are invited to contact their First Mercantile internal sales specialist to receive the new proposal for their prospects.

For more information about First Mercantile, please contact your representative or call First Mercantile at (800) 753-3682.

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### **About First Mercantile**

First Mercantile, one of the premier collective investment trust (CIT) recordkeepers in the United States, offers investment solutions for qualified retirement plans. Employing a due diligence process, First Mercantile Trust (FMT) searches the investment universe to select non-proprietary options suited for the investment platforms. CITs are sub-advised by institutional money managers, or invest in mutual funds or exchange traded funds (ETFs). Also included on the investment platform are Dimensional Fund Advisor (DFA) investments, Lifestyle and Target Date options. First Mercantile acts in a fiduciary capacity with respect to the management of the assets of the collective investment trust. The Advisor Review Committee oversees the entire due diligence process, which includes qualitative and quantitative analysis.

These investment products are distributed through solid relationships with quality investment consultants and third party administrators. First Mercantile offers full fee disclosure and transparency with a flexible and competitive cost structure. FMT has a national network of seasoned, knowledgeable professionals to provide excellent client service, customer care and support.

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