

Strong Designs that Work and Last

Madison Pension Services: Corporate History and Overview

Madison is a benefits-consulting firm servicing small and mid-sized companies dedicated to the art and science of pension consulting. Madison works closely with its clients and their employees and advisors, in the effective accumulation of assets leading up to retirement. Madison also assists in the strategic deployment of those assets after employee retirement.

Founded in 1978 by David Gensler, Madison has grown to serve over 650 Clients, managing four hundred million dollars in assets. Based in Purchase, New York, clients range from single-owner companies to those with more than 3,000 employees and cover a wide range of industries nationwide, from high tech to health care and legal.

Madison has formed a special partnership with John Hancock and Nationwide. The company also has relationships with most of the major financial institutions. This results in the seamless and effective design and management of client's retirement programs.

David Gensler, Madison's president, is an investment advisor associated with National Retirement Partners Financial, Inc., a select group of retirement-centric individuals and firms that have pooled their resources and knowledge to leverage best practice. NRPF has over \$33B in retirement plan assets, giving it high prestige and visibility with the various 401 (k) service providers.

Madison executives have spoken and taught at hundreds of industry functions and seminars. Madison is often quoted in such publications as the *Wall Street Journal* and *Crain's Business*. Madison employees are retirement plan specialists and actuaries, and are ASPPA accredited. Madison has invested heavily in technology and is moving forward with paperless initiatives, e-friendly and web-based solutions.

The summer of 2008 will mark Madison's thirtieth year.

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DAVID I. GENSLER President Madison Pension Services, Inc

David I. Gensler is the president of Madison, an actuarial and retirement consulting firm, specializing in custom plans for small and mid-sized companies. Established in 1978, Gensler was a founding principal, and has over thirty years of consulting actuary experience. Madison manages over \$400 million in assets and is a member of NRP, a select group of nationwide pension consulting firms that pool resources to leverage best practice. Combined, NRP manages \$24 billion in assets.

Gensler is an Enrolled Actuary and a member of both the American Academy of Actuaries and the American Society of Pension Professionals & Actuaries (ASPPA). Considered a leading expert in the field of qualified plans and 401k's, Gensler is a frequent lecturer, and has been quoted in *The Wall Street Journal*, *The New York Times*, and *Crain's Business*.

Gensler has served as the Co-Chair of the ASPPA Government Affairs Committee, and has provided leadership and expertise in the area of pension legislation on both the state and federal levels. He has taught several ASPPA courses on employee benefits and is on the board of ASPPA's New York chapter Benefits Council.

Gensler received a BA in English from Herbert H. Lehman College in 1974. He lives in Westport, Connecticut, with his wife Jane, his son Simon, and their two dogs.

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HEIDI L. GOLDSTEIN-SIDLEY

Executive Vice President / Managing Director
Madison Pension Services, Inc



With twenty years in the financial services industry, Goldstein-Sidley manages Madison Pension Services administration and benefits consulting practice. As executive vice president / managing director, she is responsible for the day-to-day running of the company. Goldstein-Sidley joined Madison in 2005 as head of marketing and operations.

Madison Pension Services, Inc, based in Purchase, New York, helps companies implement and run successful retirement plans. Founded in 1978, Madison has grown to serve over 650 Clients. The asset in those clients' retirement plans exceeds four hundred million dollars. Clients range from single-owner companies to those with more than 3,000 employees.

Prior to joining Madison, Goldstein-Sidley was the International Employee Benefits Specialist for Shearman & Sterling, based in France, where she helped to build a successful global equity plan practice. She also worked with Towers Perrin, KMPG, as well as the Retirement Services Division of the Bank of New York.

Born in the UK, Goldstein-Sidley grew up in the benefit consulting industry. Her father, Robert Goldstein, is CEO of Avenir Equity LLC, an employee benefit consulting and investment advisory firm. Sidley-Goldstein interned through college for her father in the 80's working with his actuaries and other pension professionals. Through this exposure at a young age, she was inspired to pursue a career in the field of employee benefits. Goldstein-Sidley is a dual national of both the US and UK, fluent in French, and studied actuarial science in the graduate program at Georgia State University and applied mathematics and statistics at SUNY Stonybrook. Goldstein-Sidley also holds a black belt in both judo and karate, and has competed in first division international competitions.

She lives in White Plains, NY with her husband, Craig, and is a mother of two, Benjamin and Isobel.

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