

INTEGRITY | COMMITMENT | SERVICE

SOLUTIONS FOR INVESTMENT MANAGEMENT

WE LIVE
HERE



CATHEDRAL
CORPORATION



WE LIVE IN A PLACE WHERE

investment managers are valued

partners



INTEGRITY | COMMITMENT | SERVICE



... a place where customer service is key and Essential™ communications are **essential** to your success.

Cathedral Essentials™ are those vital communications that keep your clients well-informed and up-to-date. The timeliness, effectiveness, and accuracy of these communications are a direct reflection on you—and critical for building long-term relationships. ✨ Why Cathedral? Because Cathedral can provide you with expert data management and data-driven communication programs that meet your essential transactional and marketing needs, including targeted direct mail programs and personalized offer pages—to position you for a vital future. We not only guarantee error-free, on-time delivery of your communications, we partner with you to create custom solutions to meet your business goals for today and tomorrow. ✨ We know that you live your commitment to your clients. When you choose Cathedral, **we live it, too.**

To thrive, you must deliver a higher level of service and customer value.

To grow, you must communicate the value and depth of your services.

To excel, you must anticipate the changing needs of your markets.

SMART COMMUNICATIONS... **that speak to smart investors**

Your clients count on you to provide complete and innovative financial solutions. In fact, they insist on it. However, your market is broader and more financially savvy than previous generations. What's more, the industry offers them more choices and opportunities when it comes to money management. You need to differentiate your services, but what can you do to distinguish yourself from the rest of the pack in the eyes of the consumer? ✨ First, by approaching each client as a long-term, strategic partner. Then, by communicating the in-depth knowledge and proven investment experience that allows you to consistently meet their critical financial needs. You already have the expertise.

It's how you share it that can make all the difference.

Cathedral helps you communicate with your clients in ways that address their needs, answer their questions, and reinforce your value. Our global approach starts with you—and the needs and goals of your market. Then we recommend custom communications solutions that allow you to meet and exceed those goals. ✨ Cathedral combines state-of-the-art data management expertise, in-depth industry knowledge, and an unparalleled commitment to your success to deliver the Essential™ communications that smart clients count on. With comprehensive print, mail, and electronic communications services, we offer both data-driven transactional and marketing programs that help you exceed expectations—and give you a competitive edge.



Solutions as innovative as you are

When you choose Cathedral for your Essential™ communications, you're choosing a partner that is completely committed to helping you achieve your goals. Our investment management team understands the challenges and requirements of the financial sector and closely monitors industry trends that influence client expectations so we can help you stay ahead of the curve.

With over 80 years of data management experience, we are experts at handling complex data streams and formats, allowing us to continually create intelligent, targeted solutions. For example, we've developed a seamless process for integrating multiple statements for one account into a single envelope. This results in significant postage savings and streamlined execution and provides the client with all of their account information at one time—adding both convenience and ease.

Meeting—and exceeding—expectations

At Cathedral, our success is measured by your success. That's why our expert teams are always at your service—technical experts to coordinate your data, customer service experts to ensure that your communications are accurate and delivered on time, and direct mail experts that help you present new products and services to your customers in ways that engage your unique market.

We utilize highly regarded Six Sigma principles to continuously identify and eliminate potential defects from our products, processes, and transactions. Your data is reviewed and analyzed to ensure the integrity of your communications before they go out the door. That means error-free documents, fewer client phone calls, and more time to focus on developing new products and services. We also ensure the security of your data with state-of-the-industry production redundancy and disaster recovery backup.

Quality—it's more than a goal

At Cathedral, we live our commitment to delivering your Essential™ communications on time, every time with 100% accuracy. And it's more than a goal—it's the way that we do business.

Whether we're creating personalized marketing materials with customized content, building interactive e-statements, assessing a mailing program, or cleansing your data, Cathedral guarantees unparalleled customer service and commitment.

AWARD WINNING SOLUTIONS TRANSLATE INTO real savings and competitive benefits

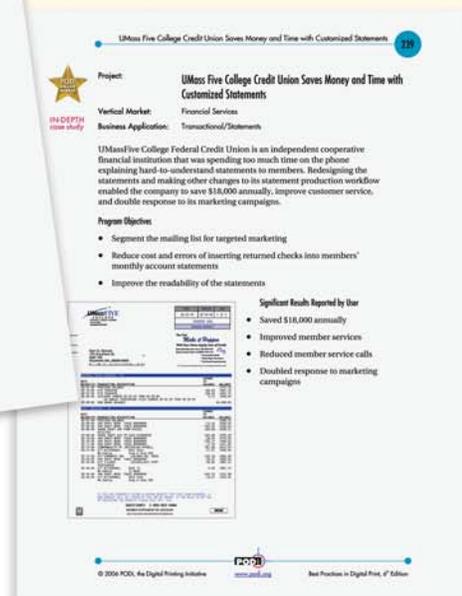
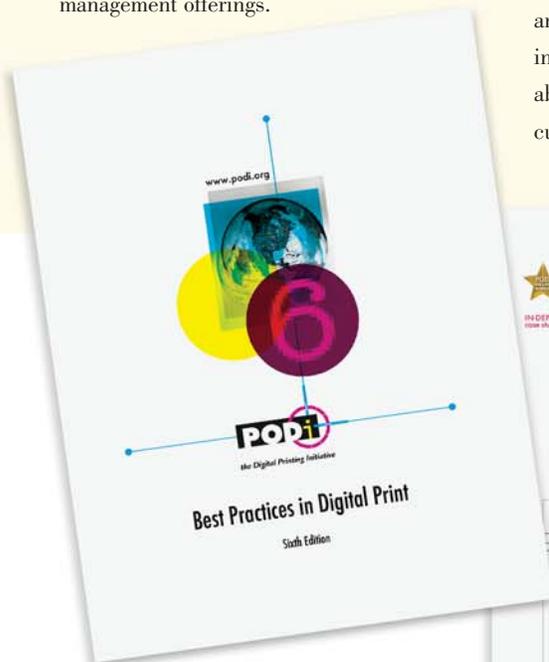
Cathedral approaches our clients as unique individuals with their own business requirements and goals—helping them achieve measurable results. The proof is in the Best Practices Award from PODi, the Digital Printing Initiative, that we received in 2006 for outstanding digital print solutions that achieve quantified results. While this award was received for a credit union application, the quality processes involved extend across all Cathedral's investment management offerings.

When UMass Five College Federal Credit Union in Hadley, Massachusetts asked us to improve their customer experience with a personalized financial communication program, we delivered a solution that offered many valuable returns.

Working closely with our client, we redesigned their e-statements to improve readability, usability, and ultimately, response rates. We reorganized the content into logical groups, chose larger fonts, and used color to draw the reader to key information. We also incorporated the ability to print check images for specific customer accounts.

As a result, end-user satisfaction went up and the number of service calls went down. Our customer saw improved segmentation and was able to develop more effective one-to-one communications, doubling their response to marketing campaigns. E-statements also eliminated nearly \$20,000 in annual costs associated with inserting and mailing cancelled checks. Duplex printing of paper statements also offered additional savings by reducing paper usage and postage costs.

Let Cathedral deliver the same benefits for your company.



Cathedral offers comprehensive solutions for your Essential™ communications.

Our industry experts are constantly developing new applications and identifying best practices that can help investment management firms communicate value to customers every day.

PRODUCTS

- ▶ check issuance
- ▶ confirms
- ▶ periodic financial statements
- ▶ intelligent, data-driven inserting
- ▶ interactive e-statements
- ▶ customized 1099 solutions
- ▶ data-driven, one-to-one marketing programs

SERVICES

- ▶ flexible data management and maintenance
- ▶ comprehensive mailing support
- ▶ online customer service center
- ▶ full range of printing options including nested full color with black and white for maximum effectiveness and value
- ▶ address correction and forwarding through the U.S. Postal Service® NCOA^{Link™} service

CATHEDRAL ADVISOR
Cathedral Advisor Variable Annuity Quarterly Statement

Contract #: ZZZ0000 Owner: SAM SAMPLE
Annuitant: SAM SAMPLE
Program Participation: Automatic Investment Plan

To access your contract value 24 hours a day call 1-800-255-8462 or visit www.einvestamerica.com

Your Account Activity for April 1, 2005 - May 20, 2005

DATE	TRANSACTION	PORTFOLIO	INIT VALUE	UNITS	VALUE
04/01/05	Opening Balance				\$32,802.19
04/01/05	Transfer				108.71
	From One Year Guaranteed Account	N/A	N/A		498.71
	One Year Guaranteed Account	N/A	N/A		498.71
04/15/05	Transfer				829.27
		N/A	N/A		275.26

CATHEDRAL ADVISOR
Cathedral Advisor Variable Annuity Quarterly Statement

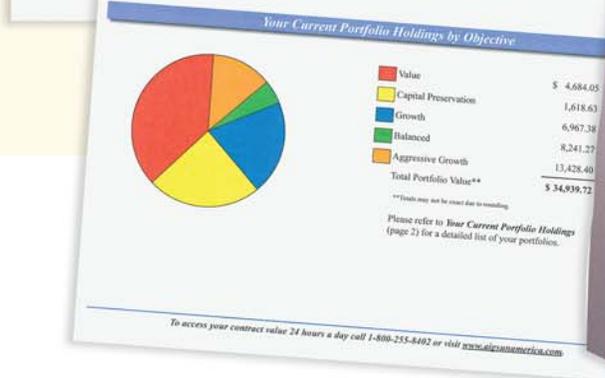
Prepared for:
SAM SAMPLE
123 MAIN STREET
ANYTOWN, USA 12345-6789

Representative:
JANE SAMPLE
SAMPLE INVESTMENTS CORPORATION
P.O. BOX 123
ANYTOWN, USA 12345-6789

Visit us on the web at www.einvestamerica.com to get Current Values and Account Summary.

Your Contract Profile As Of May 20, 2005

Contract #:	ZZZ0000	Current Value:	\$ 34,939.72
Owner:	SAM SAMPLE	Value as of Last Quarter:	\$ 32,802.19
Issued:	5/22/2005	Premiums to Date:	
Contract Type:	Qualified Simple IRA	Withdrawals to Date:	
Annuitant:	SAM SAMPLE	Current Death Benefit:	
Program Participation:	Automatic Investment Plan	Surrender Value:	
Optional Benefits:	One Year Step-Up Death Benefit		





CATHEDRAL
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Cathedral can translate your critical communications needs into Cathedral Essentials™—high-value document and communication services that can include checks, statements, e-statements, invoices, and personalized direct mail, as well as complete data management and maintenance services. With over 80 years of experience and an absolute guarantee for accuracy and timeliness, you can count on Cathedral to deliver Essential™ communications solutions that are as innovative as they are effective in positioning you for a vital future.

Contact us to learn more about how Cathedral can help you exceed client expectations, receive application samples, or arrange for an online demo. We know that you live your commitment to your clients. When you choose Cathedral, **we live it, too.**