



Pensions on PEACHTREE 2023



M&A IMMERSIVE

The Ferenczy Players

SCRIPT 1

Miss Peach

- The Client
 - 140 Employees
 - Two locations
- Plan: Yes – Transamerica
 - Eligibility: Age 21 / 1 YOS
 - 401k: Yes; Disc PS
 - Match: 50% up to 6%
- Attorney – FBLC • HR – Mary Jane
- TPA – Regina • CFO – David

SCRIPT 2

Miss Peach	Plum Lucky	Colonel Mustard
<ul style="list-style-type: none"> The Client <ul style="list-style-type: none"> 140 Employees Two locations 	<ul style="list-style-type: none"> Purchased 9/15/22 <ul style="list-style-type: none"> Asset Sale → Stock Sale Joined Peach Payroll 1/1/23 Enroll in Peach Plan 1/1/23 	<ul style="list-style-type: none"> Upcoming Purchase <ul style="list-style-type: none"> Enroll in Peach Plan 6/1/23
<ul style="list-style-type: none"> Plan: Yes – Transamerica <ul style="list-style-type: none"> Eligibility: Age 21 / 1 YOS 401k: Yes; Disc PS Match: 50% up to 6% 	<ul style="list-style-type: none"> Plan: Yes 	<ul style="list-style-type: none"> Plan: Yes
<ul style="list-style-type: none"> Attorney – FBLC TPA – Regina HR – Mary Jane CFO – David 	<ul style="list-style-type: none"> Former CFO - Norman Body 	

SCRIPT 3

Miss Peach	Plum Lucky	Colonel Mustard
<ul style="list-style-type: none"> The Client <ul style="list-style-type: none"> 140 Employees Two locations 	<ul style="list-style-type: none"> Purchased 9/15/22 ➡ 9/21/22 ✓ <ul style="list-style-type: none"> Asset Sale ➡ Stock Sale ✓ Joined Peach Payroll 1/1/23 Enroll in Peach Plan 1/1/23 	<ul style="list-style-type: none"> Upcoming Purchase <ul style="list-style-type: none"> Enroll in Peach Plan 6/1/23
<ul style="list-style-type: none"> Plan: Yes – Transamerica <ul style="list-style-type: none"> Eligibility: Age 21 / 1 YOS 401k: Yes; Disc PS Match: 50% up to 6% 	<ul style="list-style-type: none"> Plan: Yes – John Hancock <ul style="list-style-type: none"> Terminated effective 11-2022 <ul style="list-style-type: none"> Distributing terms and actives Has loans <ul style="list-style-type: none"> Stopped loan payments 11-2022 Would like to Merge Plan 	<ul style="list-style-type: none"> Plan: Yes
<ul style="list-style-type: none"> Attorney – FBLC TPA – Regina HR – Mary Jane CFO – David 	<ul style="list-style-type: none"> Former CFO - Norman Body 	

SCRIPT 4

Miss Peach	Plum Lucky	Colonel Mustard
<ul style="list-style-type: none"> The Client <ul style="list-style-type: none"> 140 Employees Two locations 	<ul style="list-style-type: none"> Purchased 9/15/22 ➡ 9/21/22 ✓ <ul style="list-style-type: none"> Asset Sale ➡ Stock Sale ✓ Joined Peach Payroll 1/1/23 Enroll in Peach Plan 1/1/23 	<ul style="list-style-type: none"> Upcoming Purchase on 6/1/23 <ul style="list-style-type: none"> Stock Sale (Peach subsidiary) Continue Separate Payroll Enroll in Peach Plan 6/1/23
<ul style="list-style-type: none"> Plan: Yes – Transamerica <ul style="list-style-type: none"> Eligibility: Age 21 / 1 YOS 401k: Yes; Disc PS Match: 50% up to 6% 	<ul style="list-style-type: none"> Plan: Yes – John Hancock <ul style="list-style-type: none"> Terminated effective 11-2022 <ul style="list-style-type: none"> Distributing terms and actives Has loans <ul style="list-style-type: none"> Stopped loan payments 11-2022 Would like to Merge Plan 	<ul style="list-style-type: none"> Plan: Yes – Automations R Us <ul style="list-style-type: none"> 401k; Match; Loans Would like to Merge Plan
<ul style="list-style-type: none"> Attorney – FBLC TPA – Regina HR – Mary Jane CFO – David 	<ul style="list-style-type: none"> Former CFO - Norman Body 	<ul style="list-style-type: none"> HR – Anna Espadrille

SCRIPT 5

Miss Peach	Plum Lucky	Colonel Mustard
<ul style="list-style-type: none"> The Client <ul style="list-style-type: none"> 140 Employees Two locations 	<ul style="list-style-type: none"> Purchased 9/15/22 ➡ 9/21/22 ✓ <ul style="list-style-type: none"> Asset Sale ➡ Stock Sale ✓ Joined Peach Payroll 1/1/23 Enroll in Peach Plan 1/1/23 	<ul style="list-style-type: none"> Upcoming Purchase on 6/1/23 <ul style="list-style-type: none"> Stock Sale (Peach subsidiary) Continue Separate Payroll Enroll in Peach Plan 6/1/23 Miss Scarlet's Hot Sauce – 38 EE <ul style="list-style-type: none"> Subsidiary in CM Plan since '18
<ul style="list-style-type: none"> Plan: Yes – Transamerica <ul style="list-style-type: none"> Eligibility: Age 21 / 1 YOS 401k: Yes; Disc PS Match: 50% up to 6% 	<ul style="list-style-type: none"> Plan: Yes – John Hancock <ul style="list-style-type: none"> Terminated effective 11-2022 <ul style="list-style-type: none"> Distributing terms and actives Has loans <ul style="list-style-type: none"> Stopped loan payments 11-2022 Would like to Merge Plan 	<ul style="list-style-type: none"> Plan: Yes – Automations R Us <ul style="list-style-type: none"> 401k; Match; Loans Would like to Merge Plan Mustard Plan Issues: <ul style="list-style-type: none"> Missing Signed Documents <ul style="list-style-type: none"> No PE Agreement for Scarlet Bond & Form 5500 Issues
<ul style="list-style-type: none"> Attorney – FBLC TPA – Regina HR – Mary Jane CFO – David 	<ul style="list-style-type: none"> Former CFO - Norman Body 	<ul style="list-style-type: none"> HR – Anna Espadrille

SCRIPT 6

Miss Peach	Plum Lucky	Colonel Mustard
<ul style="list-style-type: none"> The Client <ul style="list-style-type: none"> 140 Employees Two locations 	<ul style="list-style-type: none"> Purchased 9/15/22 ➡ 9/21/22 ✓ <ul style="list-style-type: none"> Asset Sale ➡ Stock Sale ✓ Joined Peach Payroll 1/1/23 Enroll in Peach Plan 1/1/23 	<ul style="list-style-type: none"> Upcoming Purchase on 6/1/23 <ul style="list-style-type: none"> Stock Sale (Peach subsidiary) Continue Separate Payroll Enroll in Peach Plan 6/1/23 Miss Scarlet's Hot Sauce – 38 EE <ul style="list-style-type: none"> Subsidiary in CM Plan since '18
<ul style="list-style-type: none"> Plan: Yes – Transamerica <ul style="list-style-type: none"> Eligibility: Age 21 / 1 YOS 401k: Yes; Disc PS Match: 50% up to 6% Amended to Count Predecessor Service 	<ul style="list-style-type: none"> Plan: Yes – John Hancock <ul style="list-style-type: none"> Terminated effective 11-2022 <ul style="list-style-type: none"> Distributing terms and actives Has loans <ul style="list-style-type: none"> Stopped loan payments 11-2022 Would like to Merge Plan 	<ul style="list-style-type: none"> Plan: Yes – Automations R Us <ul style="list-style-type: none"> 401k; Match; Loans Would like to Merge Plan Mustard Plan Issues: <ul style="list-style-type: none"> Missing Signed Documents <ul style="list-style-type: none"> No PE Agreement for Scarlet Bond & Form 5500 Issues Amended to Freeze Plan
<ul style="list-style-type: none"> Attorney – FBLC TPA – Regina HR – Mary Jane CFO – David 	<ul style="list-style-type: none"> Former CFO - Norman Body 	<ul style="list-style-type: none"> HR – Anna Espadrille

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