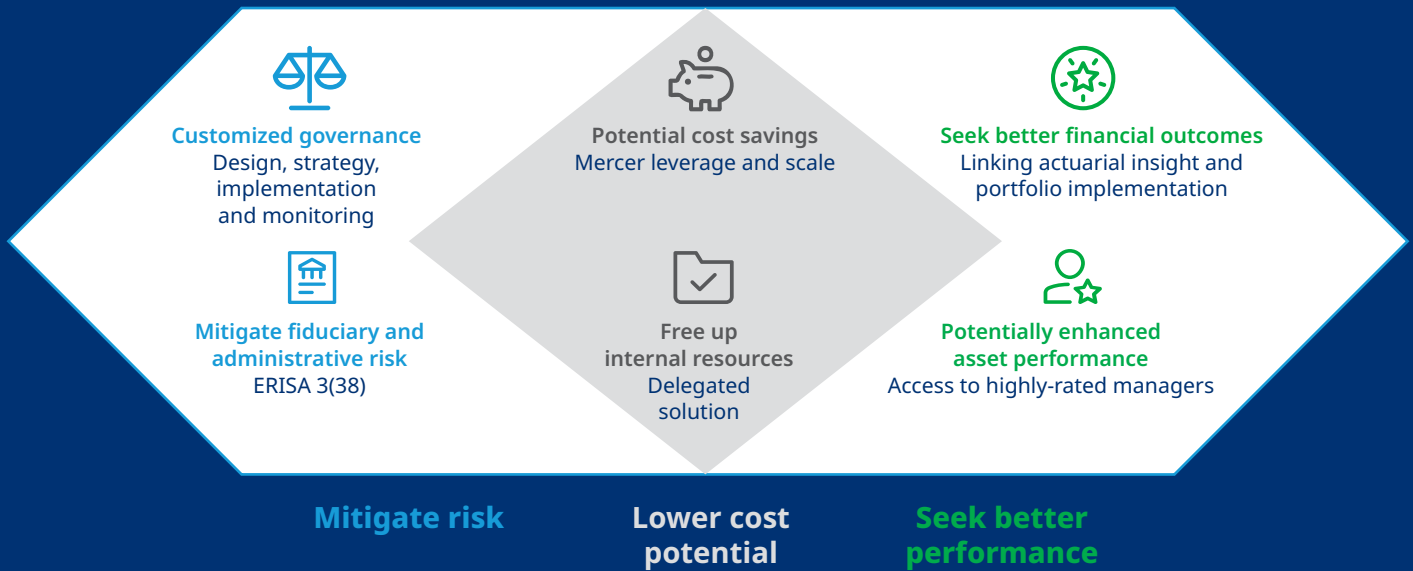


# Mercer Pension Solution

## A robust solution for plan financial management

Via an integrated plan management platform, Mercer’s Pension Solution brings together actuarial, administration and investment services for an extensive, end-to-end experience designed to offer significant benefits to both plan sponsors and plan participants.



## Mercer credentials globally



Experience



Process



Connections

### Defined Benefit wealth leader<sup>1</sup>

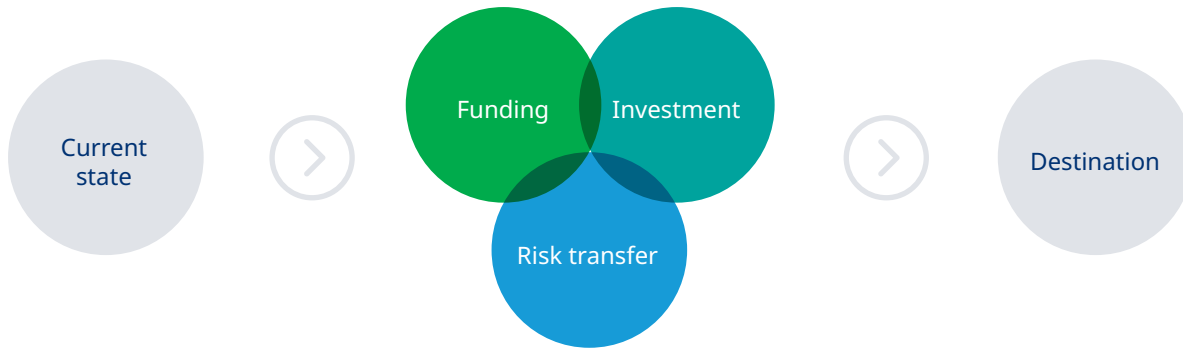
Largest global DB wealth advisors <sup>1</sup>			Among US pension risk transfer market leaders		
<b>\$366B+</b> Assets under management globally — largest institutional OCIO <sup>1</sup>	<b>\$15T+</b> Assets under advisement globally — largest investment advisors <sup>1</sup>	<b>\$400B+</b> Liabilities under advisement in the US <sup>2</sup>	<b>&gt;125</b> Plan terminations since 2017	<b>~40%</b> US Market advisory pension risk transfer market since 2017 <sup>3</sup>	<b>700+</b> Annuity placements in US since 1988

1. Source: Pension & Investments, Assets under Advisement (AUA) ranked by worldwide assets under advisement as of June 30, 2020 as reported by each firm to P&I. Pensions & Investments OCIO survey, worldwide discretionary assets under management as of March 31, 2021 as reported by each firm to P&I. Mercer did not pay a fee to participate in this survey. This survey is not indicative of the adviser’s future performance. Please see Important Notices for important information about Assets under Advisement and Assets under Management.

2. Source: Mercer estimate based on 2019 Form 5500 Schedule SB data for Corporate defined benefit plan filings.

3. Source: Mercer analysis and LIMRA data.

# We will help you build and execute a DB destination strategy



Many levers and opportunities on the asset and liability sides are available for companies to deploy. It is critical to determine which could yield the greatest return on investment and how best to sequence and coordinate them to reach the ultimate destination.

## Mercer's Pension Solution — a smarter defined benefit solution that aspires to deliver better financial outcomes

### CLIENT TEAM

Actuarial services	Strategy	Portfolio implementation	Performance monitoring	Tactical outsourcing services
<ul style="list-style-type: none"> <li>Valuation report</li> <li>Funded status monitoring</li> <li>Financial reporting</li> <li>Budget estimates</li> <li>Compliance requirements</li> <li>Integrated strategy support</li> </ul>	<ul style="list-style-type: none"> <li>Definition of objectives</li> <li>Strategic asset allocation</li> <li>Asset/liability modeling</li> <li>Glide path development</li> <li>Contribution policy</li> <li>Risk transfer strategy</li> </ul>	<ul style="list-style-type: none"> <li>Manager selection and monitoring</li> <li>Portfolio construction</li> <li>Execution of manager changes</li> <li>Glide path execution</li> <li>Rebalancing</li> </ul>	<ul style="list-style-type: none"> <li>Performance reporting</li> <li>Operations (liquidity and cash management)</li> <li>Financial reporting support (5500, FAS 157, Audit)</li> <li>DB destination progress reporting or support</li> </ul>	<ul style="list-style-type: none"> <li>Calculations and packets</li> <li>Compliance activities/mailings</li> <li>Trust authorizations</li> <li>Maintain participant data</li> <li>Participant calls</li> <li>Execute risk mitigation</li> </ul>

If you are interested in learning more, please [contact us](#).

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