

Announcing New Strategic Insight Report

In Plan Guarantees: Identifying Trends and Opportunities in an Evolving Marketplace

Strategic Insight is pleased to announce a new report that sheds light on this evolving area of retirement income and provides details on this nascent marketplace, including specifics on the products that are available and a perspective on their future.

Gain a better understanding of the strategy of each product and the rationale behind the product design with:

- ◇ Detailed descriptions of 14 in-plan guarantees
- ◇ Quick reference grid of all products, including links to additional product information and rollover products (as available/applicable)
- ◇ Market sizing data and analysis
- ◇ Analysis of challenges, opportunities and areas of improvement
- ◇ Overview of the retirement income crisis and backdrop for the push to include income guarantees in employer-sponsored retirement plans.

Sections detailing challenges, opportunities, and areas of progress provide a more comprehensive analysis of the environment for in-plan guarantees. For example, the establishment of lifecycle funds as qualified default investment alternatives (QDIAs) has altered the trajectory of in-plan guarantee designs.

Links to specific studies and a glossary of key terms are included. The appendix provides detailed information on the QDIA rule and the products used to provide lifetime guarantees.

For information on the report or to request an executive summary, contact:

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What is the report useful for?

- Assess Market Potential
- Compare Current Providers
- Compare Products
- Strategic Planning