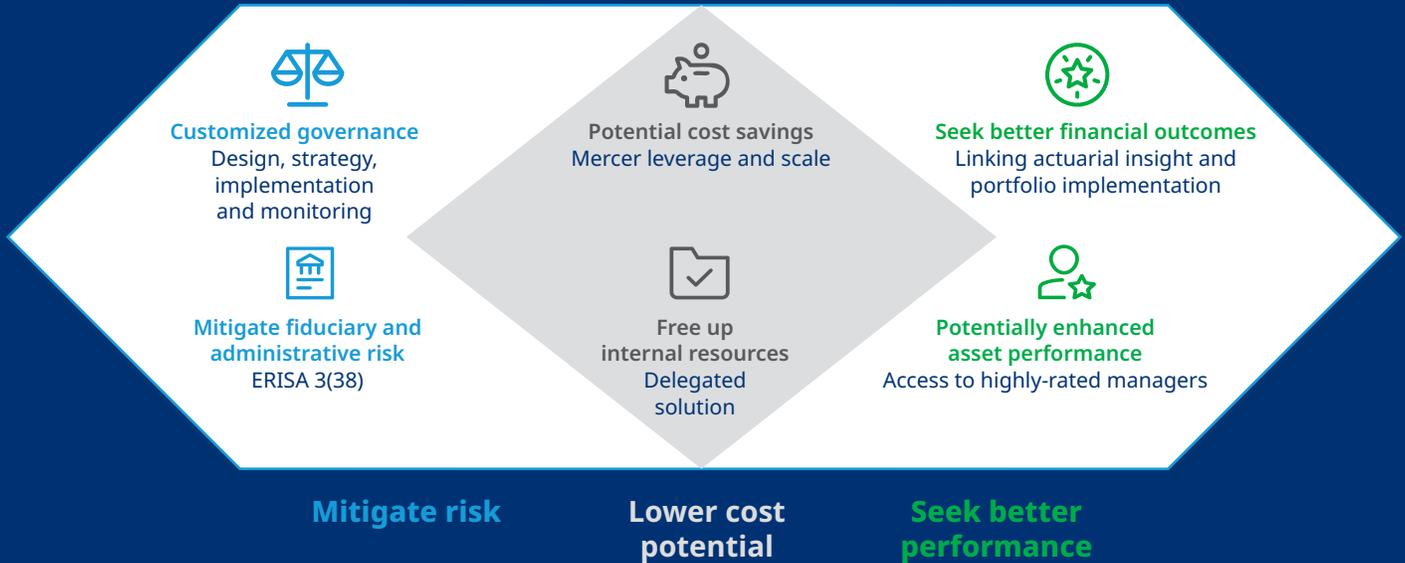


Mercer Pension Solution

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 (DB) wealth leader¹

Largest global DB wealth advisors¹

Among US pension risk transfer market leaders

\$392.8B+

Assets under management globally — largest institutional OCIO¹

\$16.2T+

Assets under advisement globally — largest investment advisors²

\$350B+

Liabilities under advisement in the US³

>150

Plan terminations since 2017⁴

~200 transactions

and **~\$52B** advised in market in the last five years⁴

800+

Annuity placements in US since 1988⁴

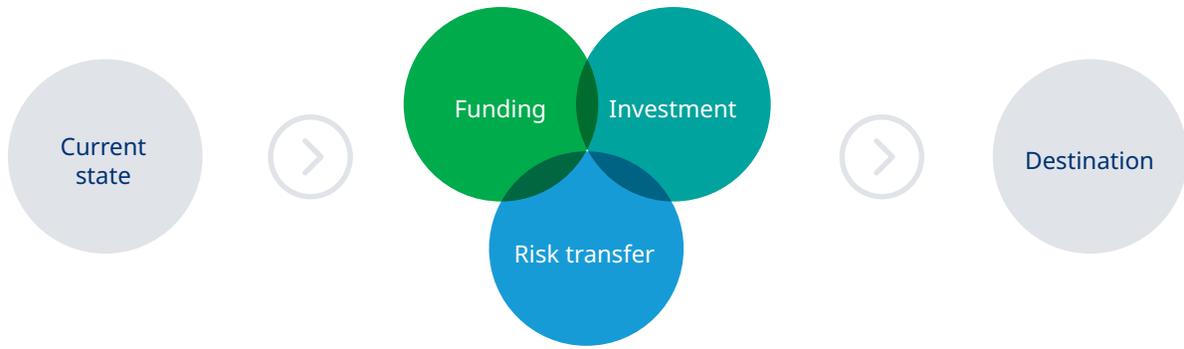
1. Source: "Pensions & Investments" magazine's 2023 Consultants Survey, worldwide investment outsourcing assets under management as of June 30, 2023 as reported by the 37 participating firms to P&I ([LINK](#)). Mercer did not pay a fee to participate in this survey. This ranking is not indicative of the adviser's future performance. Mercer's US AUM for the same period June 30, 2023 was \$128.1 billion. Please see important notices for Important Notices for information on assets under management.

2. Pensions & Investments, AUA ranked by worldwide assets under advisement as of June 30, 2023 as reported by the 61 participating firms to P&I. Mercer's US AUA for the same period as of June 30, 2023 was \$4.7 trillion. 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 information on assets under management.

3. Source: Mercer estimate based on 2022 Form 5500 Schedule SB data for Corporate defined benefit plan filings.

4. As of December 31, 2023.

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

Important Notices

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