

MERCER FUTURE WISE™

A SMART, COMPREHENSIVE DC SOLUTION

Defined contribution (DC) plan sponsors are constantly searching for ways to reduce costs, ease plan management responsibilities and improve participant outcomes. However, for many, this can be a challenge due to the lack of time, insufficient resources and limited expertise in regulations and DC plan management.

Mercer Future Wise™, a delegated defined contribution solution, lets you outsource aspects of pension and savings plan governance to Mercer so that you can focus on more strategic outcomes for your employees. This inclusive approach provides plan sponsors with the full suite of Mercer's DC services – from **portfolio management** and **investment selection**, to **vendor management** and **compliance**, to **plan design** and **fee negotiation**.

MERCER FUTURE WISE – ADVANTAGES FOR BOTH SPONSORS AND MEMBERS



MERCER'S GLOBAL REACH, EXPERTISE AND SCALE



The information above is accurate as of December 30, 2016, and includes worldwide personnel, assets under management and assets under advisement across Mercer's Investments business and Fiduciary Management business. Data is derived from a variety of sources, including, but not limited to, third-party custodians or investment managers, regulatory filings, and client self-reported data. Mercer has not independently verified the data. Data includes assets of clients that have engaged Mercer to provide project-based services within the 12-month period ending on December 31, 2015, and assets of clients that subscribe to Mercer's Manager Research database.

1. Pensions & Investments. Pensions & Investments Survey, 30 September 2016.
 2. Chief Investment Officer. "2017 Outsourced-Chief Investment Officer Buyer's Guide", available at <http://www.ai-cio.com/2017-Outsourced-Chief-Investment-Officer-Buyers-Guide>. Mercer assets-under-management data as of 30 September 2016.
 3. Greenwich Associates survey, 18 May 2016.
 4. Please see "Important Notices" for further information.

YOU FOCUS ON STRATEGY

STRATEGIC FOCUS – We action our best advice on your behalf (implemented consulting) to leave you free to concentrate on the strategic aspects of your benefit programs.

WE CAN DO THE REST

MERCER GLOBAL INVESTMENT FUNDS – We provide our “Best of Mercer” approach with access to top-tier investment managers, who are selected from Mercer’s extensive global investment manager research team. Should the need arise to change an investment option, the process is performed seamlessly and automatically within the funds.

TIME SAVINGS ON GOVERNANCE AND IMPLEMENTATION – Mercer strives to ensure continuous quality from all vendors by overseeing third-party managers and the program record keeper. Employers receive frequent status reports and are freed up from spending countless hours several times a year reviewing options and making investment decisions.

PRE- AND POST-RETIREMENT SOLUTIONS – After retirement, participants will continue to have access to Mercer Global Investments’ funds, as well as independent financial advice.

FEE TRANSPARENCY – Mercer offers no hidden fees, no bundling and full transparency so employers know what they are paying to their record keeper, fund managers and Mercer.

COST SAVINGS – Mercer Future Wise can provide reduced investment fund and record keeping fees for employees, as well as cost savings associated with ongoing investment changes. In addition, Mercer has negotiated an advanced range of administration and employee financial wellness services at no additional cost, including independent financial advice for all members with our strategic record keeping partner.

SUPPORTING YOU THROUGH IMPLEMENTED CONSULTING

YOUR CLIENT TEAM

VENDOR MANAGEMENT
AND RECORD KEEPING

COMPREHENSIVE
CONSULTING

TRANSITION
MANAGEMENT

PLAN OPERATIONS
AND COMPLIANCE

PORTFOLIO
MANAGEMENT

FINANCIAL
WELLNESS

SERVICE
QUALITY

AUTOMATED PLAN
ADMINISTRATION

PLAN ANALYTICS
AND TRENDS
ANALYSIS

PLAN DESIGN AND FEE
COMPETITIVENESS
REVIEW

CONTACT US

Learn more about how you could benefit from a comprehensive DC solution. MERCER.CA

IMPORTANT NOTICES

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