

PLANSPONSOR Industry Reports 2021

Unique defined contribution (DC) benchmarking tools based on feedback from roughly 3,000 employers

AVAILABILITY: December 2020

PLANSPONSOR Industry Reports in a nutshell

- 65+ pages in PDF format
- Cover DC plans in 50 different industries
- Compare client plans to others in the same industry and asset class, and overall
- Available with your firm's branding or logo on every page
- Distributable to sales staff or adviser network; post on your client site behind registration

Every survey topic is covered in detail

- Comparisons by asset size category
- In-depth coverage of DC plan design and investments, including:
 - Plan types and design features
 - 'Auto' features
 - Participation and eligibility
 - Employer match
 - Plan investments
 - Retirement income
 - Fees/expenses
 - Defined contribution providers
 - Advice and advisers
 - Plan oversight and administration

Industries covered

- 403(b) plans
- 457 plans
- Accounting, CPA Firm, Financial Planning
- Advertising, Marketing, Printing
- Aerospace, Defense
- Agriculture
- Architecture
- Automotive Dealerships, Service
- Automotive Manufacturing, Parts
- Banking-Commercial, Retail
- Building, Construction, Contracting
- Business Services, Staffing
- Chemicals
- Consulting
- Consumer Services
- Credit Union
- Distribution, Manufacturer's Rep, Import, Export
- Education-Higher Ed
- Education-K12, Preschool, Daycare
- Engineering
- Environmental, Recycling, Remediation, Testing, Consulting
- Equipment Sales, Leasing, Service
- Financial Services
- Fortune 1000
- Government, Public Works (city, municipal)
- Government, Public Works (county, state, federal)
- Healthcare Organization (for profit)
- Healthcare Organization (not for profit)
- Hotels, Gaming, Entertainment, Hospitality, Travel
- Insurance, Reinsurance
- Investment Banking, Holding Company
- Labor Union
- Law Firm
- Manufacturing-Consumer Products
- Manufacturing-Industrial Products
- Media, Communications, Publishing
- Membership Org, Industry Assn
- Nonprofit Organization, Endowment, Foundation
- Oil & Gas, Energy, Mining
- Pharmaceuticals
- Real Estate
- Religious Organization, Social Services
- Research & Development
- Restaurant, Food Service
- Retail
- Technology, Computers, Software
- Telecommunications
- Transportation, Airline
- Utilities
- Wholesale

Customized reports (combining various industries) are also possible!

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	All Industries						Overall	Micro
	Overall	Micro	Small	Mid	Large	Mega		
Retail Target Date Fund (Actively Managed)	31.1%	18.5%	32.2%	39.3%	42.2%	22.0%	10.5%	38.3%
Retail Target Date Fund (Index)	15.8%	13.0%	13.0%	16.8%	22.4%	32.3%	10.0%	16.8%
Custom Target Date Fund	10.0%	7.0%	9.0%	11.8%	11.5%	16.5%	7.0%	11.8%
Risk-Based Lifestyle Fund	8.0%	6.0%	9.2%	8.8%	6.4%	8.1%	6.8%	8.8%
Balanced Fund	12.8%	19.1%	13.0%	9.4%	8.3%	7.3%	19.1%	9.4%
Professionally Managed Account	4.3%	6.0%	3.2%	3.7%	2.6%	7.9%	6.0%	3.7%
Fixed Income	5.7%	8.1%	7.6%	4.0%	3.8%	1.8%	8.1%	4.0%
Equity	5.7%	8.1%	7.6%	4.0%	3.8%	1.8%	8.1%	4.0%