







Defined Benefit

The Asset/Liability team provides guidance on investment strategies for Defined Benefit (DB) plans. The team delivers a variety of services including prospect analysis, asset allocation studies, investment policy development, manager searches, pension risk transfer strategies, and consulting on Liability-Driven Investing (LDI). The team also provides discretionary solutions including implementation of the DB Growth Portfolio, glidepath monitoring, and overseeing trade activity for benefit payment cash raises.

This page contains sample deliverables, educational materials, DB content, as well as links to other helpful resources. If you do not see what you are looking for, please do not hesitate to contact us!

Resources

 Resource Guide / Sample...	 Topical Spotlights
 OCIO Discretionary Solutions	 DB Plan Education
 Proof Statements	 Cash Balance Resources

Other Helpful Resources



Business Development Page



CAPTRUST 2022 Capital Marke...



Investment Committee Blog



Manager Intelligence Blog



Performance Reporting Page

Quick Links



Defined Benefit Blog



DB Custodial Factsheets



DB Growth Insert (Q1 2023)



DB Product Roadmap



DB Target Market



LDI Manager Matrix



LDI Manager Pitch Decks



Matrix Fee Schedule



OCIO Discretionary Strategy Dashboard



OCIO Onboarding



Overview of Fidelity, Pershing, & Schwab



New! Retirement Plan Resource Channel



Revamping Retirement Podcast



Single Premium Group Annuity Vendor