



ENGINEERING

The engineering industry deals with the design, improvement, and installation of integrated systems (people, materials, and energy). Areas of specialty include civil, mechanical, electrical, nuclear, and computer engineering.



CAPTRUST Experience

Clients at a Glance

Clients - 39
 AUM - \$5.7 billion
 Plans / Pools - 56
 Plan / Pool Types - DC (47), NQ (6), DB (2), OAP (1)
 Top Providers - Empower (12), TIAA (8), Principal (6), FreedomOne (5), Fidelity (4), Schwab (3), Vanguard (3)

Experienced Advisors

- Taria Agbelusi (2)
- Devyn Duex (2)
- Dan Esch (3)
- Johnny Garrett (3)
- Kim Huppertz (2)
- Mike Maresh (2)
- Ken Rogers (3)
- Andrew Shimp (2)
- Jason Stanicek (2)
- James Valmonte (2)

Industry Background

Points of Interest

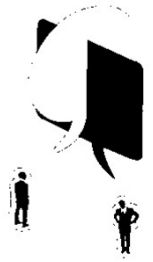
- 35% of all engineering job postings require skills in quality assurance, Six Sigma, and Lean manufacturing
- The Department of Labor estimates demand for environmental engineers to grow 9% by 2021
- Nearly 25% of engineering senior management positions are held by staff aged 55+
- Unemployment rate is nearly at zero

Common Terms

- Aerospace
- Chemical
- Civil
- Computer
- Design
- Electrical
- Geological
- Infrastructure
- Mechanical
- Nuclear
- Systems

External Resources

- American Association of Engineering Societies
www.aaes.org
- American Society of Civil Engineers
www.asce.org
- National Academy of Engineering
www.nae.edu
- National Society of Professional Engineers
www.nspe.org



For the Challenger

Client Outcomes

- Incorporating Roth executive financial planning, nonqualified, and cash balance plan options
- Integration of total benefit rewards into retirement planning
- Reduced plan expenses and created transparency
- Participant advice
- Increased match
- Better fund lineup
- Provided a more robust, objective, efficient, and documented process
- Fiduciary education and training for committee
- Benchmark of current providers, investments, and expenses
- PAS and Wellness benefits

Challenges

Corporate

- Highly competitive industry
- Ownership transition when key people retire
- Diversification of business development sources
- Market cycle contractions
- Sourcing talent
- Tight labor market
- Aging workforce
- Assisting employees with student debt
- Competition from national firms
- Strength of benefits package

Retirement

- Attracting and retaining highly compensated professionals
- Financial wellness
- Helping detailed professionals understand how it all fits together

Notes