






Defined Contribution


The Defined Contribution Services Team assists clients and advisors with a variety of topics. Through this site, you can easily find content that will help your clients and prospects make sound decisions for their retirement plan participants. Below you will find access to sample materials, client content, and quick links to resources to help you better serve your DC relationships. We hope you find what you need, but if you don't, please don't hesitate to contact us. Your feedback helps drive the content accessible through this site. Thanks!


Quick Links


 Create Institutional Research Request


 Topicals by Category

 Institutional Pulse

 Retirement Blog

 Manager Intelligence Blog

 Manager Fact Sheets

 TDF Date & Age Ranges

Resources



Meet the Team



Sample Deliverables & Resource Guide



Investments, Plan Design & Benchmarks



Discretionary 3(38) Resources



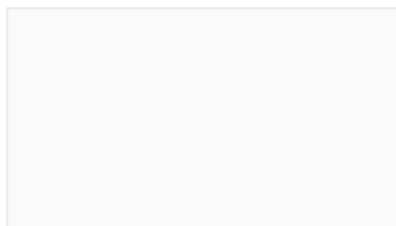
Legislative & Regulatory Updates



Vendor Analysis

News

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Retirement Plans

BMO Announces Midwest Family of Companies (MITC) as Successor of BMO Institutional Custody Business

All - Below is a communication from BMO announcing Midwest Family of Companies (MITC) as the successor of BMO's institutional custody business. The Vendor Analysis Team is having conversations with BMO to...

Retirement Plans

Fidelity Point Solutions - Details

All, Fidelity clients have started to receive information from their managing directors about the new "Point Solutions", which are various products and services that Fidelity is offering to their plan sponsors. All of these services "live outside t...

Retirement Plans

Details on TIAA revenue rebate contract adjustment

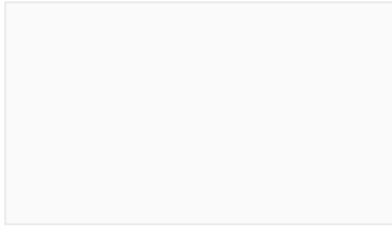
Hello everyone, This was already communicated over email but we are memorializing on the blog. Hi Everyone, Huge thanks for your patience while we got complete information from TIAA! Background: TIAA let us know that mutual fund dollars are invested...

Details on TIAA revenue rebate contract adjustment

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News

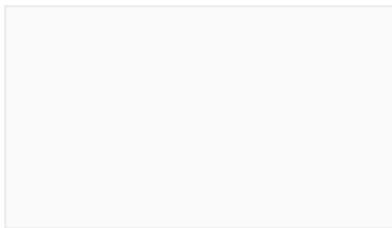
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[Traditional Manager Intelligence](#)

MFS International Growth: On-site meeting recap with Portfolio Manager Matthew Barrett (March 2023)

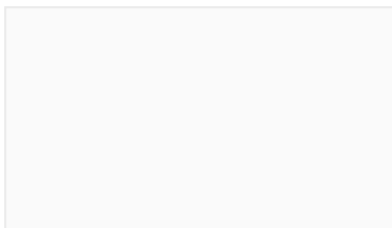
This was an on-site meeting with Matthew Barrett, co-portfolio manager for the International Growth strategy. Matthew is located in London, so he joined the meeting remotely via video conference. Institutional portfolio...



[Traditional Manager Intelligence](#)

MFS International New Discovery: On-site meeting recap with Portfolio Manager Peter Fruzzetti (March 2023)

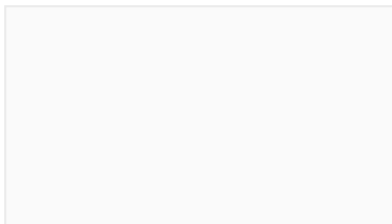
This was an on-site meeting with Peter Fruzzetti, co-portfolio manager for the International New Discovery strategy. Peter is located in London, so he joined the meeting remotely via video conference. Institutional portfolio...



[Traditional Manager Intelligence](#)

TSW Mid Cap Value - Meeting Recap

Key Takeaways Q1 returns modestly underperformed the index as negative security selection offset positive sector allocation. Selection detracted 94 bps from active return vs. the benchmark, especially in communication...



[Traditional Manager Intelligence](#)

MFS International Intrinsic Value: On-site meeting recap with Portfolio Manager Philip Evans (March 2023)

This was an on-site meeting with Philip Evans, co-portfolio manager for the International Intrinsic Value strategy. Philip is located in London, so he joined the meeting remotely via video conference. Institutional portfolio...

Discretionary Fund Change Tracker



