

# Defined Contribution Benchmarking Service

Measure • Compare • Learn • Improve • Validate

## How Our Clients Use The Service

### **Demonstrate Fiduciary Level Review of Costs**

Our clients recognize that our benchmarking report, which takes into account all cost drivers and are based on input data that is analyzed and reviewed before it can even be submitted, is the best tool they have to ensure the appropriate higher level of fiduciary review is met.

### **Target Date Fund Analysis**

CEM has the definitive analysis on target date funds, in particular costs because we adjust for asset mix and indexing differences. Given how important target date funds has become in DC plans, this alone is why some clients buy our report.

### **Manage and Reduce costs**

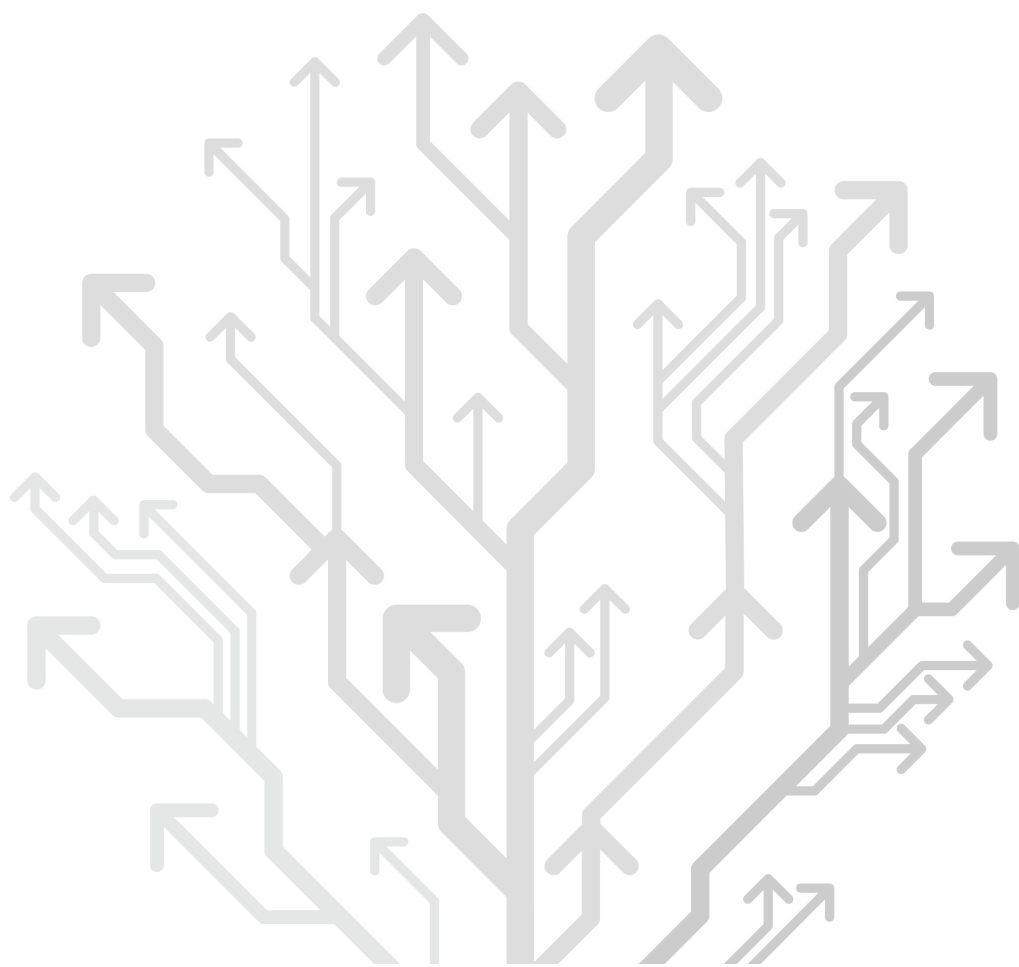
Many have successfully negotiated lower fees and costs with external managers and recordkeepers.

### **Support for Changes to Plan Design and Investment Programs**

Our report provides external validation of what others are doing, which can be invaluable when trying to get buy in from your stakeholders to make changes to your investment programs and plan design.

## Demonstrate On-going Monitoring of your Investment Options

Research insights are a big part of CEM's value proposition. We regularly produce research insights. Leverage our global industry expertise to find out what others are doing.



How It Works



## Measure

Our analysts and our methodology ensure like-for-like comparisons of costs, risk and performance.



a custom peer group and the global universe for your entire DC plan as well as by each investment option. The report is a documentation of your review process and fulfillment of your fiduciary responsibilities.



## Improve

Insights gained from your report and from our research can be used to optimize your performance and manage your costs.

## Compare



You get a comprehensive benchmarking report that compares your returns, value added, risk, costs to

## Learn



Understand where and why you are different from your peers. Benefit from our experience and research through a personal presentation and discussion of your results.

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