



# An Exceptional Experience for Plans of All Sizes

Year after year, for plans small and large, we're providing high-touch service that provides the flexibility, responsiveness, and expertise our clients depend on to create better outcomes for retirement plans and participants. It's a commitment we deliver consistently and with excellence.

**Experience. Expertise. Excellence.** Our standard offer for plans is anything but "standard."



### Experienced, tenured service team

A "one team" approach to align on plan needs:

- Strategic partners to help meet the goals of the plan
- Point of contact for daily communication and smooth plan administration
- An implementation specialist who oversees the entire conversion process



### Recognized investment leader and target date pioneer

Our target date solutions are designed to help your participants reach their retirement goals.

**See why they're different** →



### Award-winning participant experience

#### Personalized across channels

- Web, mobile, and contact center
- Personalized messaging through SmartVideos and email

#### Outcomes-focused

- Timely education
- Actionable next best step

#### Relevant and inclusive

- Targeted content driven by data
- Spanish-language content curated by Spanish-speaking associates at T. Rowe Price



### Retirement expertise, plus the power of fintech

We work with industry leaders to provide innovative and meaningful enhancements to sponsor and participant experiences.



## Exclusive target date trust offer: Amazing value. Lower minimum.

Have clients with \$10M in target date assets? We just lowered the investment minimum for our target date trusts from \$20M to \$10M for T. Rowe Price recordkept plans.

It's a valuable opportunity to get your clients lower-cost investments for their participants. Take a look:

Trust	Trustee fee
T. Rowe Price Retirement Hybrid Trusts 2005-2065, Balanced	38 bps
T. Rowe Price Retirement Trusts 2005-2065, Balanced	38 bps
T. Rowe Price Retirement Blend Trusts 2005-2065	21 bps
T. Rowe Price Target Trusts 2005-2065	36 bps
T. Rowe Price Target Blend Trusts 2005-2065	20 bps

# Proven, industry-leading service

Our institutional experience is a step above, but don't take our word for it. Here's how our clients have rated us:<sup>1</sup>

## Ranked #1

for overall satisfaction for six consecutive years

## Ranked #1

for Net Promoter Score® for eight consecutive years

## Ranked #1

for loyalty for three consecutive years

## Another step up for plans with \$10M+

Looking for the strength of an institutional offer with flexible and competitive pricing options? It's here.

Is your plan healthy?

This tool can help answer that question.

[Take a look:](#)



**Dedicated Experienced Service team** with T. Rowe Price relationship manager (RM) and client account manager (CAM)



**100% Open Architecture**, including access to CITs down to \$10M,<sup>2</sup> stable value and target date products



**Digital tool kit** providing the access to data and insights to drive plan goals and objectives



**Expanded Personalization** pooled engagement consultant resource, enhanced rollover-in support for participants

**From startups to mega plans, we offer solutions designed to address needs and uncover opportunities.**

**Contact your T. Rowe Price representative** to learn how we can take your plan to the next level.

<sup>1</sup>Chatham Partners 2022 Client Satisfaction Survey. The Chatham benchmark includes firms that represent 54% of the total recordkept market share (source: Cerulli 2021 U.S. Retirement Markets Report). All references contained here to Net Promoter Score (NPS) or Net Promoter Methodology are governed by the following copyright disclaimer: © 2015 Satmetrix Systems, Inc. All rights reserved. Net Promoter, Net Promoter Score, and NPS are trademarks of Satmetrix Systems, Inc., Bain & Company, Inc., and Fred Reichheld.

<sup>2</sup>Minimum investment requirements apply to participation in CITs.

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