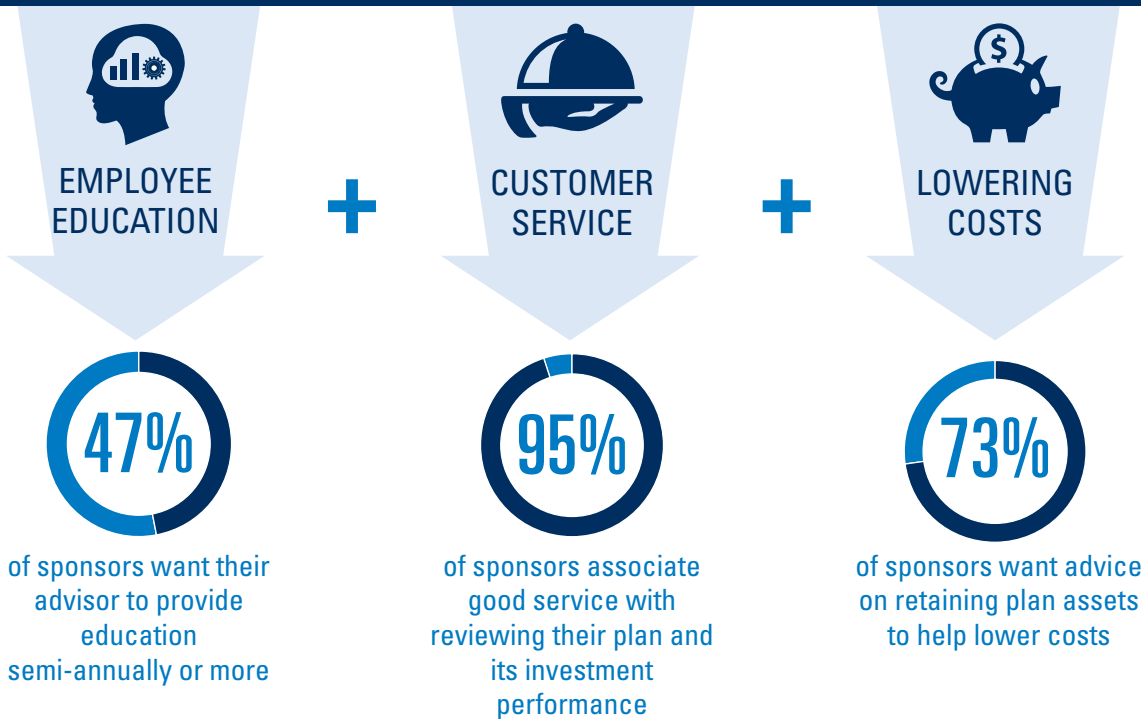




Do you have what retirement plan sponsors value most from financial advisors?

A WINNING COMBINATION

The MassMutual Winning Combination study identified what retirement plan sponsors most value from their financial advisor. The “Winning Combination” of services and capabilities that most sponsors identified were educating employees, practicing good customer service and reducing costs.



- 1 KNOW YOUR CUSTOMER**
Take the time to understand what sponsors want and build your persona accordingly.
- 2 KNOW YOUR ELEVATOR PITCH**
While plan sponsors want advisors to have a solid value proposition, few advisors can succinctly articulate their value proposition or elevator speech.
- 3 KEEP LEARNING**
Read more about our proprietary research findings and how to use them to grow your business: www.massmutual.com/winningcombination



of sponsors think their advisor is valuable and 94% are satisfied with their advisor overall

So, what does this mean for plan advisors?

KEY FINDINGS

FROM SPONSORS
WITH ADVISORS

Here's what the research found to be true

1 THESE SPONSORS ARE: 2 THESE SPONSORS WANT: 3 THESE SPONSORS TEND TO:

- More engaged
- Doing more to encourage participation in their plan
- Doing more to promote employees' overall financial wellness.

- Help with plan design
- Help with lowering the overall cost of the plan (negotiating with providers, reducing investment fees, attracting more assets to plan)

- View advisors as highly valuable
- Review their plan more often

BACKGROUND

MassMutual conducted surveys and in-depth interviews with **plan sponsors** to identify which services emphasized in an advisor's value proposition will help plan advisors attract new clients, retain and delight existing clients and earn referrals. Additional focus groups and interviews with **advisors** helped to round out the findings.



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