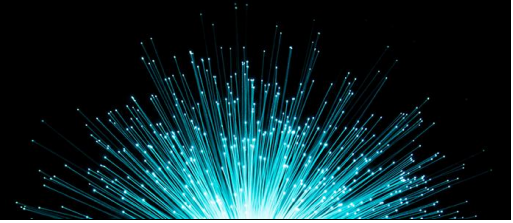


# Investment solutions



## Defined Contribution plans

At-a-glance



Russell Investments is dedicated to helping Defined Contribution (DC) plan sponsors in their quest to help improve retirement outcomes for their participants. Our experience and depth of resources in consulting, investment management, manager research, and portfolio implementation allow us to provide a wide range of innovative solutions to our defined contribution clients.

### Customizable DC solutions

We offer comprehensive investment services for your defined contribution plan.

#### A complete range of fiduciary options

	MANAGER RESEARCH	INVESTMENT MANAGEMENT	GLIDE PATH METHODOLOGY	PARTICIPANT COMMUNICATIONS	RECORDKEEPER SEARCH
COMPLETE FIDUCIARY SOLUTIONS	✓	✓	✓	✓	✓
LIFEPOINTS TARGET DATE FUNDS	✓	✓	✓	✓	
CUSTOM GLIDE PATH MANAGEMENT		✓	✓	✓	
PERSONALIZED RETIREMENT ACCOUNTS		✓	✓	✓	
STANDALONE MULTI-ASSET OPTIONS	✓	✓			
INVESTMENT CONSULTING	✓				

↑ INCREASING LEVELS OF FIDUCIARY CONTROL AND ACCOUNTABILITY

### Investment management

Since 1980, we've been hiring some of the best managers identified through our research, and packaging them in our investment funds. We closely monitor their ongoing performance, making changes when necessary.

We can also handle all aspects of performance reporting and administration, as well as trust and custodial services either on an asset class by asset class basis, or as part of an OCIO solution.

### By the numbers

<b>\$287.3 billion<sup>†</sup></b> Global assets under management	<b>\$204 billion<sup>‡</sup></b> DC assets under advisement, global	<b>\$8.8 billion<sup>‡*</sup></b> DC assets under management, U.S.	<b>\$7.3 billion<sup>‡</sup></b> In custom glide path assignments	<b>50+</b> Institutional DC clients worldwide
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All data as of 12/31/2017, unless otherwise noted. <sup>†</sup> Global AUM as of 9/30/2018. <sup>‡</sup> Global DC AUA, U.S. DC AUM as of 9/30/2018. \*Does not include custom target date assets. The numbers listed above represent the firms' aggregate DC business.

### Our research advantage

Our manager research, asset allocation technology, portfolio design, and capital markets insights are at the forefront of the investment industry, we offer:

- 300+**  
Russell Investments professionals are directly involved in our investment process.
- 35+**  
Russell Investments analysts research investment managers worldwide.
- 80+**  
managers and analysts actively manage portfolios worldwide.
- 7,860**  
traditional and alternative investment products are scrutinized in 2017.
- 769**  
Investment products made it to our buy list.

### Proven industry leaders



## Investment solutions

A well-designed DC plan will typically offer a combination of default investments for participants who wish to leave the management and monitoring of their portfolios to a professional along with other core investment options for those participants who prefer to be more personally involved. At Russell Investments, we offer both.

- **Default options:** We offer several default investment options to meet the unique needs of your plan, including the LifePoints® Institutional Target Date Strategy Funds, custom Target Date Funds, and the innovative Personalized Retirement Accounts (PRA) managed account solution.
- **Individual funds:** We also offer a large selection of individual, institutionally priced multi-asset funds in both traditional asset classes and real asset solutions for an efficient core investment menu.

## Consulting

For almost 50 years, our global network of consultants and research analysts have helped institutional investors maintain efficient and effective investment programs. We offer:

- Strategic advice customized around your DC plan's goals,
- Investment policy refinement and asset class strategy modeling,
- Capital markets insights, asset manager research, and
- Efficient implementation of investment strategies.

## Our DC clients benefit from our depth and breadth of capabilities.



Market forecasts, prepared by our **CAPITAL MARKETS INSIGHTS** professionals, are used as inputs in our strategic **ASSET ALLOCATION** process.

Insights from our **MANAGER RESEARCH** team help us better understand the likely performance behavior when pairing various managers.

Our deep understanding of **FACTOR EXPOSURES** helps us know when it makes sense to access specific investment exposures via active management, and when it may be better to take a more cost-effective, passive approach.

Our target date **IMPLEMENTATION** and rebalancing process benefits greatly from the experience of Russell Investments' implementation services, one of the industry's largest transition managers.

**To discuss how we can help improve your DC plan, contact Holly Verdeyen at 312-780-7146, [hverdeyen@russellinvestments.com](mailto:hverdeyen@russellinvestments.com) or visit [Russellinvestments.com/dc](http://Russellinvestments.com/dc)**

## Important information

Nothing contained in this material is intended to constitute legal, tax, securities, or investment advice, nor an opinion regarding the appropriateness of any investment, nor a solicitation of any type. The general information contained in this publication should not be acted upon without obtaining specific legal, tax, and investment advice from a licensed professional.

Award information (in order of appearance):

1. For the fourth year in a row, Russell Investments is ranked as one of the top-five largest custom target date managers in the Pensions & Investments' (P&I) 2018 annual survey of DC money managers. P&I ranking is based on 12 respondents reporting custom target date assets under management (AUM) as of 12/31/2017.
2. #1 Global manager of outsourced assets (2018 CIO OCIO Survey): Russell Investments was ranked as the top global manager of institutional outsourced assets, out of 34 firms, in CIO Magazine's "2018 Outsourced-Chief Investment Officer Survey", based on the AUM from its fully discretionary clients.
3. For the ninth year in a row, Russell Investments was ranked as one of the top-five largest consultants. Ranking is based on worldwide institutional assets under advisement (AUA) by the 2018 Pensions & Investments Consultant Directory.
4. Russell Investments was named as the winner of CIO Magazine's 2017 Industry Innovation Award for Investment Outsourcing. CIO cited Russell Investments' top client satisfaction rankings in the magazine's 2016 and 2017 OCIO Vendor Ratings surveys, as well as the firm's position as one of the world's largest OCIO providers. This is Russell Investments' fifth time as a CIO Industry Innovation Award winner since the awards were created in 2010. [The CIO Industry Innovation Awards have various categories; recipients may differ each year and not be repeated. Previous award wins: FX (2011); Tactical Risk Management (2012); Investment Outsourcing (2013); Transition Management (2014).]

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All data current as of 12/31/2017 unless otherwise noted.

First used: August 2018. Revised: December 2018 AI-26835-12-20