

Data Connection

By No Author *Tue, Sep 3, 2024*

401(k) Retirement Income Products		
Provider	Product	Start
Charles Schwab	Schwab Monthly Income Funds*	2008
Alliance Bernstein	Lifetime Income Strategy**	2012
Principal Financial	Pension Builder†	2015
T. Rowe Price	Retirement Income 2020*	2017
Lincoln Financial	Pathbuilder Income**	2020
Great Gray Trust	IncomeAmerica 5ForLife**	2021
Nationwide/Capital Group	NCIT American Funds Lifetime Income Builder**	2021
State Street	IncomeWise**	2021
State Street	Retirement Income Builder**	2023
Nuveen	Lifecycle CIT Series**	2023
BlackRock	LifePath Paycheck**	2024
J.P. Morgan Asset Mgt.	SmartRetirement Lifetime Income**	2024

*Managed payout fund. **Embedded annuity.
 †In-plan deferred income annuity.
 Source: Morningstar and named companies.