

Post-Participation Investing

By Kerry Pechter *Thu, May 17, 2018*

Which elements of RETIREMENT INCOME PRODUCTS are most important to DC plan consultants?			
Retirement Option Characteristic	Very Imp't	Imp't	Sum
Liquidity*	43	46	89
Inflation protection*	29	57	86
No new added fiduciary risk*	48	30	78
IRA rollover- eligibility*	24	46	70
Low to little volatility*	16	46	62
QDIA-eligible*	18	42	60
Distribution sourced from income*	15	41	56
Equity exposure*	17	37	54
Insurance guarantees	17	30	47
Stated distribution yield	3	32	34
High capital return objective	7	26	33
*Considered very important or important by more than half of consultant respondents. Source: PIMCO's 12 th Annual Survey 2018, <i>Defined Contribution Consulting Support and Trends Survey</i> .			