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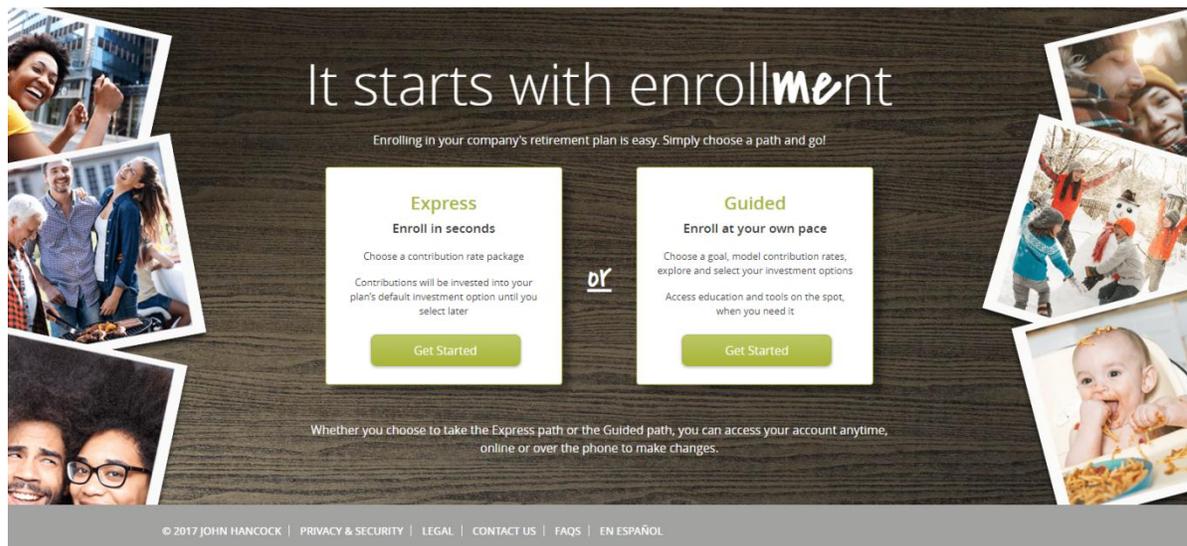
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Top DC Online Enrollment Practices Identified in DALBAR Study

(Boston, MA. January 19, 2018) Recognizing the impact of that first connection with one's retirement plan, DALBAR honed in on Online Enrollment processes for Defined Contribution plans and measured the success of providers' efforts in ensuring that a participant's first exposure to their plan is positive and ends with successful enrollment. The best processes were identified and the winners are...

1. John Hancock Retirement Plan Services (Guided Path)
2. Voya Financial
3. John Hancock Retirement Plan Services (Express Path)
4. Newport Group (Current Experience)
5. TIAA (SRK Enrollment Experience)

John Hancock Retirement Plan Services' enrollment paths both ranked in the Top 5 and the firm's initial Welcome to enrollees also receives top billing for its highly engaging landing page, action-driven messaging, and easily understandable introductory resources.



"We are thrilled that DALBAR has recognized our Online Enrollment Experience. Joining a company-sponsored retirement plan is one of the most impactful steps an individual can take during their life-long financial journey and it is encouraging to receive this validation as we continue to work to help participants save more." – Andrew D. Ross, Senior Vice President, Product Development and Marketing, John Hancock Retirement Plan Services

Second place **Voya Financial** utilizes techniques that can potentially drive higher contribution rates. Enrollees are prompted to set goals and an appropriate rate is suggested based on those goals. The display of a peer benchmark serves as added motivation to choose a higher rate.

Newport Group's 4th ranked Enrollment process excels at keeping participants oriented through the presentation of the steps at the onset, and continuing to indicate enrollees' progress throughout. Designating a beneficiary is a cinch, even for those unfamiliar with the concept, and earns the firm the top spot for this enrollment task.

TIAA's best-in-class Investment Selection capabilities boost its process to the 5th spot. Enrollees have the flexibility to be hands on or off with selecting investments and this often intimidating activity is simplified via well-designed, easily utilized pages that hold sufficient details and the necessary support to get the job done.

19 firms were included in DALBAR's Online Enrollment study, with a total of 23 processes reviewed. Enrollment processes were scored on a 100-point scale in several criteria which are grouped into eight broad categories: Initial Impression, Gathering Personal Details, Contribution Selection, Investment Selection, Beneficiary Designation, Keeping Enrollees Oriented, Guidance & Support and Behavior Centricity.

For more information about DALBAR's *State of the Industry: Online Enrollment report*, please contact Shelley Eramo at seramo@dalbar.com or <http://www.dalbar.com/catalog/product/110>

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