



Making decisions *easier* and lives *better*

Consulting and aligning with you, we focus on the outcomes you want for your retirement plan.



John Hancock is part of Manulife Investment Management, one of the world's largest retirement plan providers.¹ We help people around the globe confidently save and invest for their retirement goals.

>8.9M¹

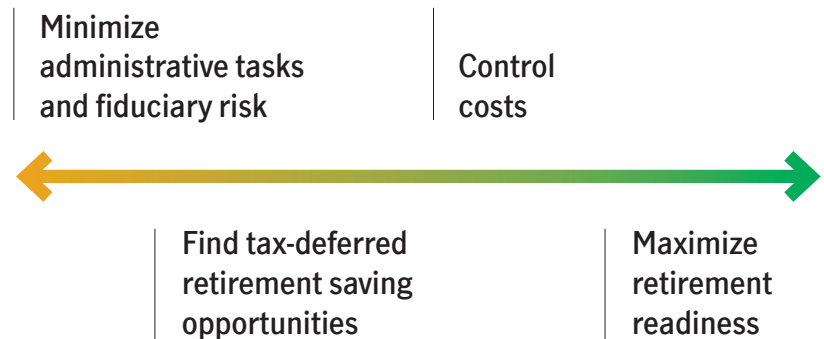
participants worldwide served by

>4,700¹

retirement employees

We help you design a plan around *your* goals, not ours

We're here to help you offer the plan you want for your business and your employees. And we know that one size doesn't fit all plans—and your goals for your retirement plan are unique to you.



With more than 50 years of retirement plan experience, we'll consult with you to understand your objectives. And we have the commitment and scale to help you deliver your desired outcomes.

Delivering on outcomes requires a thoughtful, deliberate approach that's flexible enough to meet the needs of all our clients. With John Hancock, you'll work with a team of collaborative partners who:

- Are responsive to your service needs
- Will help design the plan around your needs
- Use data to guide you through your plan decisions
- Help your employees achieve their retirement goals



¹ As of 9/30/23. Global retirement rankings for Global Wealth and Asset Management (GWAM) are by volume and based on most recent market data available (figures are based on 2Q23 year to date for Asia, Canada, and the United States and 2Q23 quarterly for GWAM, unless otherwise specified) from various independent market surveys, including LIMRA, Tillinghast, Fraser, IFIC, and other sources. See the [Manulife Q3 2023 Global Company Fact Sheet](#) for more information.

FOR PLAN SPONSOR USE ONLY. NOT FOR USE WITH PLAN PARTICIPANTS.

A *responsive* service model

You'll work with an integrated service team as we work together with your chosen plan partners to provide²:

- Seamless sponsor and participant experiences,
- ERISA services and government reporting, and
- Plan advisory services.

Together, we'll help you navigate the complexities of plan sponsorship while helping your employees with their retirement goals.



A plan designed around *you*

With our consultative approach, we'll ask you what you want out of your retirement program. And we'll work with your partners to design it around the outcomes you want to achieve.

Data-driven *decisions*

We use data intelligently to help guide employer and employee decision-making and to measure outcomes, such as plan effectiveness and participant behavior. We'll answer your call, follow your request through to completion, and continuously monitor our performance through customer satisfaction.

Delivering retirement *readiness*

Using personalization, proactive engagement, and goal-driven tools, our participant experience motivates people to take action to help improve their financial well-being and retirement readiness. Our award-winning tools³:

- Guide participants through enrollment,
- Put a fully transactional app in their hands, and
- Give them a view of their projected retirement spending.

Focused on the outcomes *you* want

When you work with John Hancock, we'll align with your goals to help you deliver the results you want for your plan, your business, and your employees.



**Responsive
service model**



**Result-focused
plan design**



**Insightful plan
management
tools**



**Personalized
participant
experience**

² Plan administration, compliance, and other services provided by an independent plan consultant (TPA) and financial professional are subject to the terms and conditions of the service agreement with that party, which is separate from the John Hancock contract and recordkeeping agreement. ³ "2023 Internet Advertising Competition Awards," Web Marketing Association, Inc., 2023; "2023 Eddy Awards," *Pensions & Investments*, 2023; "2022 Mobile Web Awards competition," Web Marketing Association, Inc., 2022; "DALBAR's State of the Industry—Mobile Online Enrollment," #1 for mobile app enrollment, #1 for quick enrollment, and #4 for traditional enrollment, DALBAR, Inc., June 2022.

We make retirement plans *work*.

Defined contribution plans

Defined benefit plans

Taft-Hartley plans

Nonqualified plans

Total retirement outsourcing



For more than 50 years, we've helped people plan and invest for retirement. Today, we're one of the largest full-service providers in the United States. (Source: "PLANSPONSOR 2023 Defined Contribution Recordkeeping Survey © 2023 Asset International, Inc.," 2023.)

The content of this document is for general information only and is believed to be accurate and reliable as of the posting date, but may be subject to change. It is not intended to provide investment, tax, plan design, or legal advice (unless otherwise indicated). Please consult your own independent advisor as to any investment, tax, or legal statements made.

John Hancock Retirement Plan Services LLC provides administrative and/or recordkeeping services to sponsors or administrators of retirement plans through an open-architecture platform. John Hancock Trust Company LLC provides trust and custodial services to such plans. Group annuity contracts and recordkeeping agreements are issued by John Hancock Life Insurance Company (U.S.A.), Boston, MA (not licensed in NY), and John Hancock Life Insurance Company of New York, Valhalla, NY. Product features and availability may differ by state. All entities do business under certain instances using the John Hancock brand name. Each entity makes available a platform of investment alternatives to sponsors or administrators of retirement plans without regard to the individualized needs of any plan. Unless otherwise specifically stated in writing, each entity does not, and is not undertaking to, provide impartial investment advice or give advice in a fiduciary capacity. Securities are offered through John Hancock Distributors LLC, member FINRA, SIPC.

NOT FDIC INSURED. MAY LOSE VALUE. NOT BANK GUARANTEED.

© 2024 John Hancock. All rights reserved.

MGTS -PS 384792-GE 02/24 549762 MGR0118243321276 | 549762

FOR PLAN SPONSOR USE ONLY. NOT FOR USE WITH PLAN PARTICIPANTS.