



We make Taft-Hartley plans *work*

The experience, capabilities,
and support you need for a
successful, union-sponsored
defined contribution plan

THIS MATERIAL IS FOR INSTITUTIONAL PLAN SPONSOR USE ONLY.
NOT FOR DISTRIBUTION OR USE WITH THE PUBLIC.



Committed to labor unions and the retirement programs that help make them *stronger*

At John Hancock, we understand that helping union members save for retirement comes with a unique set of circumstances. The involvement of many employers, cyclical employment, ever-changing regulations, and a mobile workforce can all create complexity for members and plan trustees. That's why our focused approach to Taft-Hartley defined contribution (DC) plans has been so successful—as shown by our nearly perfect client retention rate.¹

Taft-Hartley is an important part of our retirement plan business

Taft-Hartley DC plan highlights
(as of June 30, 2023)

170
plans

\$36.9B
in AUMA

62%
of DC
participants²

39%
of DC
AUMA²

1,089,114
participants

25+

years of experience
helping to make Taft-Hartley
DC plans work

99%

retention rate for
Taft-Hartley plans

You'll benefit from our focused approach

- A dedicated Taft-Hartley team with firsthand knowledge of the union market
- A proprietary Taft-Hartley recordkeeping system built to suit the needs of your multiemployer plans and fund office staff
- A dedicated Taft-Hartley call center based in North America

¹ John Hancock internal sources as of 6/30/23. ² Percentage of DC participants and AUMA in the John Hancock Total Retirement Solutions open-architecture plans as of 6/30/23.

THIS MATERIAL IS FOR INSTITUTIONAL PLAN SPONSOR USE ONLY.
NOT FOR DISTRIBUTION OR USE WITH THE PUBLIC.

Harnessing the power of partnership to deliver support and service

- A plan design tailored—and services scaled—to the unique needs and geography of your union and membership
- A relationship manager and client service manager to consult with and help you make informed plan decisions about your plan
- Fiduciary services and formalized governance to help optimize your retirement program
- A true team approach to servicing your plan that includes the financial professionals and benefits consultant your union relies on

A participant experience that's personalized

- Education and communications designed specifically for Taft-Hartley plan participants
- A targeted experience based on the structure of your plan—whether member or trustee directed—and your members' retirement and financial wellness needs

John Hancock's Taft-Hartley DC plan approach

- ✔ Service and support from a team that's dedicated to and experienced with Taft-Hartley plans
- ✔ Plan management and administration to make your job easier
- ✔ Plan sponsor website and analytic dashboards for insight
- ✔ Open-architecture investment platform for flexibility
- ✔ An engaging experience for members

THIS MATERIAL IS FOR INSTITUTIONAL PLAN SPONSOR USE ONLY.
NOT FOR DISTRIBUTION OR USE WITH THE PUBLIC.

John Hancock's commitment to union labor extends to:



Internal building operations and service trade positions



The printing of Taft-Hartley plan materials



The use of North American-based customer service support for Taft-Hartley plan members

Each of these commitments is subject to applicable fiduciary standards and the achievement of competitive returns.

For more information on how we can help make your DC plan work more effectively, contact your John Hancock Taft-Hartley representative or visit **retirement.johnhancock.com**.

Katie Bailey

Regional Vice President, Taft-Hartley Services John Hancock

E kbailey@jhancock.com

M 508-259-6856

Jill Carney

Associate Director, Taft-Hartley Services

E jcarney@jhancock.com

T 401-261-1750

Bill Evans

Regional Vice President, Taft-Hartley Sales

E wevans@jhancock.com

M 860-422-3110



For complete information about a particular investment option, please read the fund prospectus. You should carefully consider the objectives, risks, charges, and expenses before investing. The prospectus contains this and other important information about the investment option and investment company. Please read the prospectus carefully before you invest or send money. Prospectus may only be available in English.

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 herein.

John Hancock Retirement Plan Services LLC provides administrative and/or recordkeeping services to sponsors or administrators of retirement plans as well as a platform of investment alternatives that is made available without regard to the individualized needs of any plan through an open-architecture platform. John Hancock Trust Company LLC provides trust and custodial services to such plans. Unless otherwise specifically stated in writing, John Hancock Retirement Plan Services LLC does not, and is not undertaking to, provide impartial investment advice or give advice in a fiduciary capacity.

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

© 2023 John Hancock. All rights reserved.

S-PS15274-GE 9/23 506553

RS0907233098019

**THIS MATERIAL IS FOR INSTITUTIONAL PLAN SPONSOR USE ONLY.
NOT FOR DISTRIBUTION OR USE WITH THE PUBLIC.**