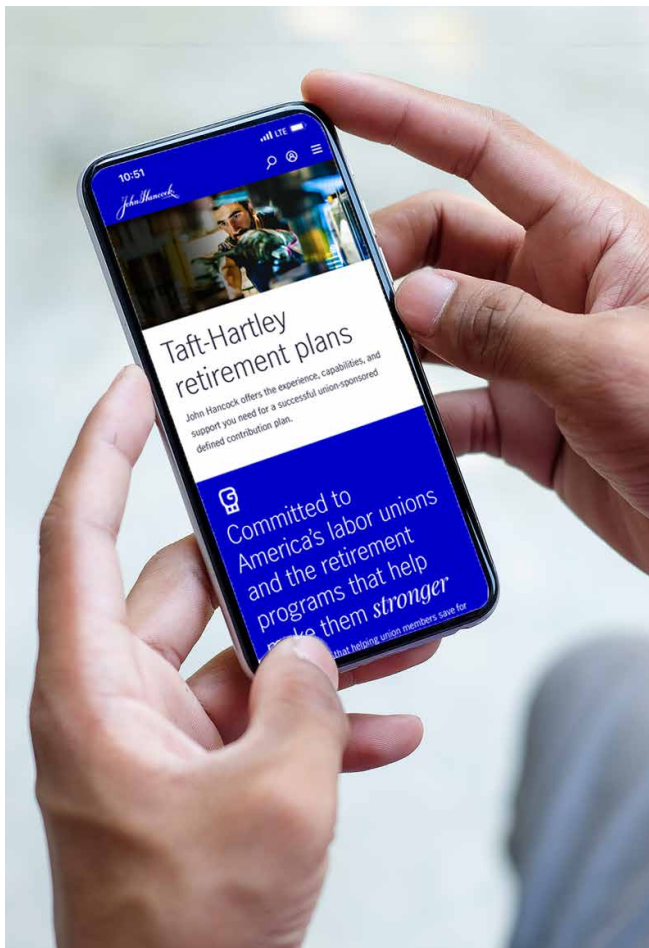




Taft-Hartley —where reputation meets *results*

The experience, capabilities,
and support you need for a
successful, multiemployer
defined contribution plan

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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

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

Taft-Hartley DC plan highlights
(as of June 30, 2024)

182
plans

\$43.5B
in AUMA

60%
of DC
participants²

54%
of DC
AUMA²

1,133,066
participants

25+
years of experience
building reputation
based on results

11
years of tenure,
on average

98%
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 833-38-UNION
- Experience with a variety of plan structures, including trustee-directed, member-directed, and those with 401(k) features
- A committed Taft-Hartley client advisory board offering specialized strategies for plan management and member engagement.

¹ John Hancock internal sources as of 6/30/24. ² Percentage of DC participants and AUMA in the John Hancock Total Retirement Solutions open-architecture plans as of 6/30/24.

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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

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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.johnancock.com**.

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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.

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