

# More opportunities. Better experiences. Stronger outcomes. Get there with always-on innovation.

Today, businesses have greater flexibility and incentives to sponsor and maintain a retirement plan, enroll more employees, and encourage participants to save more for retirement. How will you leverage this unprecedented opportunity to expand your practice and build assets under management (AUM)?

## IN THE SERVICE OF BETTER OUTCOMES

Our human-centered approach to innovation draws from our expertise in behavioral science to create and deliver smart recordkeeping solutions and a simple, seamless, and supportive customer experience that's designed for results.

## THE SCIENCE OF TEAMWORK

Our multidisciplinary digital experience group—which is comprised of seasoned associates with backgrounds in cognitive science, technology, advanced analytics, and digital design—work closely with our product and technology teams to create easy-to-use, industry-leading solutions that can save you and your clients time, optimize plan health, and lead to remarkable results.

## MINING DATA TO DRIVE BETTER RESULTS

Our team of data scientists use predictive modeling and machine learning to understand participant behaviors. These insights, combined with qualitative user research, are used to create and build outcome-focused tools, messages, and nudges that encourage plan participants to make informed decisions that can put them on the path to financial security.

Share these case studies with prospective clients to show how our data in action drives plan results.

[Case Study 1: Experimentation in Action](#)

[Case Study 2: Nudging Plan Participants Toward Smarter Decisions](#)



## GOOD PRODUCTS SOLVE PROBLEMS

We focus on outcomes, not outputs. An outcome-first mindset helps ensure that the solutions we offer are optimized to meet changing clients' needs.



For sponsors, it means solving the challenges of managing their employer-sponsored plan—administrative burdens, fiduciary oversight, and cost.



For participants, this means using the available levers for building financial security—savings, investments, and time.

**Our leading-edge technology platform, advanced analytics, and purpose-built product roadmap provide the enhanced customer experience, deeper plan insights, and broad selection of solutions you need to scale your practice, expand your offering, and increase your success.**

**So wherever you want your business to take you, Ascensus can help you get there.**

**Connect with your sales team member or check out our [advisor toolkit](#) for new ideas or to run a plan cost comparison.**

## PERSONALIZED INSIGHTS AND SMART TOOLS TO HELP YOUR CLIENTS OPTIMIZE THEIR PLAN

We use research and data from our recordkeeping platform to show how your client's plan compares to others, understand which features contribute to overall retirement readiness, and more.

**Employer Contribution Trends**

- 81% of retirement plans offer a match
- 54% of retirement plans that offer a match fund a match
- 84% of retirement plans offer profit sharing

**Auto Enrollment**

- 69% Avg. participation rate for plans without auto-enroll
- 81% Avg. participation rate for plans with auto-enroll
- 82% Avg. participation rate for plans with auto-enroll and auto-increase

**Retirement Savings across Age Bands**

The chart below highlights the average 401(k) account balances for savers of given age ranges on our platform. It's possible they also have assets in other savings accounts, IRAs, etc. that aren't represented here. The more money employees save—and the earlier they start—the better.

Age Range	Average Account Balance
<25	\$4,544
25-34	\$17,885
35-44	\$44,229
45-54	\$81,363
55-64	\$126,138
65+	\$170,345

## SERVICE EXCELLENCE MATTERS

Ascensus was named a top 10 provider in customer satisfaction in the JD Power 2022 U.S. Retirement Plan Digital Experience Study<sup>SM</sup>.

We also rank high in customer loyalty both for overall client satisfaction and onboarding experience, as shown below.

## World-Class Net Promoter Scores® (NPS)

**+83 NPS**  
Overall client satisfaction

**+79 NPS**  
Onboarding experience

>70: World-class

>50: Excellent

>0: Good

Source: Ascensus NPS Data. 12/31/2022