

# Plan Sponsors: Juggling While Treading Water?

November 4, 2016

Executive Summary:

This presentation from the annual Competitive Challenges Conference includes key issues facing investors and projected allocation changes. Here are the key takeaways:

- Adopt a long-term focus — Articulate the long-term opportunities and risks of investment opportunities and adopt a “no-surprise” policy in communications with clients.
- Better understand needs — Stay abreast of clients’ evolving needs to help develop deeper advisory relationships with key institutional investors.
- Be a team player — Understand both the value proposition of the firm’s product and how it fits with clients’ broader portfolios to ensure overall plan sponsor objectives are met.



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