2011 Retirement Market in Focus

Market Size, Segmentation and Trends At Year-End 2010

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Retirement Research Inc.

About RG Wuelfing & Associates, Inc.

RG Wuelfing & Associates is a leading provider of market research, public relations, mergers and acquisitions services, and other strategic planning and business consulting services for the retirement plan and investment industries. The nature of our services places us in regular contact with plan sponsors, service providers, consultants, brokers, investment managers, legislators, regulators, and industry media. We routinely survey benefit managers, retirement plan service buyers, and plan participants across the country on a variety of issues. As a result, we have an unrivaled perspective on the issues and events shaping the future of the industry.

RG Wuelfing & Associates founded and manages the Society of Professional Asset-Managers and Record Keepers (SPARK), the nation's foremost retirement plan industry trade association, and The SPARK Institute, the leading voice in Washington, D.C., for retirement plan services providers.

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About Retirement Research, Inc.

Retirement Research, Inc. is focused exclusively on the retirement services industry, offering research-based topical white papers, consulting services, profiles of leading providers and products in the defined contribution market and a suite of interactive, web-based competitive analysis tools covering both product and investment offerings.

RRI Market Monitor Reports[SM] help retirement services and investment providers address emerging trends and market opportunities through examination of market segments or topical issues. Each data-rich report typically covers market sizing, growth potential and competitive dynamics.

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Trends in U.S. Institutional Retirement Markets

Table 3

Retirement Plan Net Cash Flow (Net Acquisition of Financial Assets in Billions)

	Private DB Plans	Private DC Plans	Total Private	Public Plans*	Private Plus Public
2001	- $63	$43	- $20	$87	$67
2002	- $35	$52	$17	$9	$26
2003	- $13	$40	$27	$40	$67
2004	- $37	$47	$10	$24	$34
2005	- $32	$65	$33	$5	$38
2006	- $47	$100	$53	$46	$99
2007	- $76	$108	$32	$1	$33
2008	- $82	$31	- $51	$17	- $34
2009	- $35	$70	$35	- $28	$7
2010	- $43	$70	$27	- $42	- $15

* State and Local Government Plans; excludes 457 Plans
Source: Analysis of Federal Reserve Board Flow of Funds data.

The 401(k) Market

Table 12

Segmented by Assets at Year-End 2010

By Assets	No. of Plans (000)	No. of Participants* (000,000)	Assets (000,000,000)
< $1m	364.4	7.8	$140
$ 1m - $ 5m	127.5	8.6	$265
$ 5m - $10m	20.8	4.4	$145
$10m - $25m	13.1	6.5	$200
$25m - $50m	4.6	5.1	$160
$50m - $250m	4.1	12.7	$425
$250m - $1B	1.1	11.2	$505
> $1 Billion	0.4	18.1	$1,235
Total	**536.0**	**74.4**	**$3,075**

*Includes actives, retirees and vested terminated participants. Participant counts have been adjusted to reflect changes in the way the DOL defines participants.
Source: Analysis of Form 5500 data.

The ESOP Market

Table 19

Segmented by Participants at Year-End 2010

By Participants	No. of Plans (000)	No. of Participants* (000,000)	Assets (000,000,000)
< 100	4.0	0.3	$15
100 - 1,000	2.3	0.8	$50
1,000 - 5,000	0.3	1.1	$70
> 5,000	0.3	10.6	$720
TOTAL	**6.9**	**12.8**	**$855**

* Includes actives, retirees and vested terminated participants.
Source: Analysis of Form 5500 data.

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