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First Mercantile Introduces New Participant Education Services

(Memphis, Tenn.) – First Mercantile is pleased to introduce new optional participant education services available on a fee basis effective immediately. The services can be arranged by the plan’s investment professional.

Upon electing these services, professional educators are dispatched by First Mercantile to deliver a presentation that reflects the needs of the plan and its participants. For initial enrollment meetings, a “Planning Your Future” presentation is currently available. Another presentation is designed exclusively to address the importance of saving enough as well as effective asset allocation.

Half-day and full-day sessions are available and can be scheduled upon request, generally within three weeks. Upon transition of a new plan to First Mercantile, the conversion group works with the plan’s investment professional to schedule the education services. For existing plans that wish to take advantage of education services, the First Mercantile relationship manager can provide assistance with scheduling.

“While professional educators will not provide investment advice to participants, at the end of a group meeting, they are available to conduct one-on-one sessions with individual participants at no additional cost. We are finding that plan sponsors and participants truly appreciate the opportunity for this type of individual interaction,” says Phil Maness, vice president and director of relationship management, First Mercantile.

To ensure continuous quality improvement, First Mercantile is asking plan sponsors and investment professionals to complete a quality control survey after the education meeting to ensure that expectations are being met and to identify opportunities to enhance the participant experience. At the present time, educational presentations are available in English and Spanish.

For more information about First Mercantile, please contact your representative or call First Mercantile at (800) 753-3682.

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About First Mercantile

First Mercantile, a member of MassMutual Financial Group, is one of the premier collective investment trust (CIT) record keepers in the United States. It offers investment solutions exclusively for qualified retirement plans. Employing a due diligence process, First Mercantile searches the investment universe to select non-proprietary options suited for its investment platforms. CITs are sub-advised by institutional money managers, or invest in mutual funds or exchange traded funds (ETFs). Also included on the investment platform are DFA Funds, Lifestyle and Target Date options. First Mercantile acts in a fiduciary capacity with respect to the management of the assets of the collective investment trusts. The Advisor Review Committee oversees the entire due diligence process, which includes qualitative and quantitative analysis.

Its investment products are distributed through solid relationships with quality investment professionals and third party administrators. First Mercantile offers full fee disclosure and transparency with a flexible and competitive cost structure. It has a national network of seasoned, knowledgeable professionals to provide excellent client service, customer care and support.

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