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First Mercantile Hosts TPA Council Roundtable

(Memphis, Tenn.) – First Mercantile, part of the Retirement Services Division of MassMutual, hosted its eighth annual Third-Party Administrator (TPA) Council Roundtable in Memphis on September 16 and 17. At this year’s roundtable, the members of the Council cited the collective investment trust (CIT) platform as a key strength in offering employers alternative choice and investment flexibility for their retirement plans. “We invest all of our plans in collective investment trusts,” noted Steve Storkan, president of Employee Benefits Group, based in Minnesota. “We have used them for all of our plans since day one because of the fact that they are exclusively intended for retirement plan dollars. And we work with First Mercantile on all of our plans because of the investment-level fiduciary responsibility that they take on.”

Other discussion items included the importance of fee disclosure and Lean Six Sigma approaches to improved TPA efficiency. The event provided a venue for an exchange of ideas and networking between the management team and TPA owners from across the country.

The roundtable’s relevance continues to increase as the demand for TPA services is on the rise. “A primary strategic element of the First Mercantile business model is the working relationship with TPAs. We are clearly seeing the lines of preference being drawn by advisors in the retirement marketplace. We recognize the important role that TPAs play in serving plan sponsors and enabling advisors to better serve plan sponsors,” said Ian Sheridan, president and CEO of First Mercantile.

Sheridan welcomed the Council members to the Roundtable, pledging ongoing support as TPAs build their practices. “As part of the MassMutual family, First Mercantile has the resources to support the important role of TPAs and their continuing growth in the retirement services market,” said Sheridan.

“The feedback we received reinforces the merit of our CIT platform,” said Stan Label, vice president and national sales manager. “Our unique combination of CITs investing in advisor funds, mutual funds and exchange-traded funds (ETFs) has proven valuable for our mutual clients.”

For more information about First Mercantile, please contact your investment professional or contact First Mercantile at 800-753-3682 or visit www.firstmerc.com.

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About First Mercantile

First Mercantile, one of the premier collective investment trust (CIT) recordkeepers in the United States, offers investment solutions for qualified retirement plans. Employing a due diligence process, First Mercantile Trust (FMT) searches the investment universe to select non-proprietary options suited for the 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 Dimensional Fund Advisor (DFA) investments, Lifestyle and Target Date options. First Mercantile acts in a fiduciary capacity with respect to the management of the assets of the collective investment trust. The Advisor Review Committee oversees the entire due diligence process, which includes qualitative and quantitative analysis.

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

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