2017 Pension Risk Transfer Poll
Key Findings

Many Plan Sponsors Likely to Use an Annuity Buyout, Interest Has Grown

Pension Risk Transfer (PRT) Activity Most Likely to Be Used

- 34% Lump sum only
- 43% Buyout in combination with a lump sum
- 13% Buyout only
- 6% Buy-in
- 3% Other

Interest in Annuity Buyouts Has Increased

- 57% say they will use an annuity buyout, up from 46% in 2015

Plan Sponsors Are Preparing for PRT

Among Those Who Have Taken Preparatory Steps

- 71% evaluated the financial impact of PRT
- 67% had discussions with key stakeholders
- 64% engaged in data review/cleanup
- 59% explored the PRT solutions available in the market


Assets-in-Kind Starting to Take Hold

- 51% of sponsors more likely to select an insurer that allows the premium for the annuity to be paid with assets-in-kind

Split Deals: Awareness Much Higher Than Interest

- 69% of sponsors aware it is possible to split an annuity buyout among two or more insurers
- 21% of sponsors likely to split a PRT transaction

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1Percentages may not total 100% due to rounding. The percentage for buyout only and buyout in combination with a lump sum is rounded to the nearest whole number.

2Buyout only and buyout in combination with a lump sum.

The MetLife 2017 Pension Risk Transfer Poll was fielded between March 30, 2017–May 8, 2017. MetLife commissioned MMR Research Associates, Inc. to conduct the online survey in cooperation with Strategic Insight, which owns PLANSPONSOR and CIO magazines. There were 129 defined benefit (DB) plan sponsors who participated in the survey, including nearly six in ten (59%) who reported DB plan assets of $500 million or more. To read the full MetLife 2017 Pension Risk Transfer Poll, visit www.metlife.com/prtpoll2017.