



**MICRUIITY**  
Simplifying Retirement Income

# NEWSLTR Q2

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## From the Editor

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For some, the summer may be a quieter and slower time of year. Here at Micruity, we've been working hard on a growing number of retirement income solutions with our clients.

As this retirement income ecosystem continues to expand, Micruity's team has moved into high-growth mode to support this market demand.

A number of additional team members have joined across nearly all of our teams, especially Product, Technology, and Customer Success. These new team members will support the growth in retirement income solutions and support our clients on these important initiatives. We're excited to have these new 'Micruitians' on board!

**Matthew Streeter, CFA**  
Senior Partnerships Lead

## Micruity News

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### NAPA Advisor Forum - Las Vegas, NV

Micruity participated in this year's NAPA Advisor Forum. Trevor Gary, Micruity's CEO, sat down with Jim Breen of Pacific Life to share his insights on retirement income technology and the ecosystem supporting retirement income solutions

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### DCIIA Kohler Advisor Forum - Kohler, WI

Micruity's Elizabeth Heffernan moderated an informative session, "Lifetime Income Solutions: From Concept to Competitive Advantage."



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### DCIIA Ambassador Event, Lake Villa, IL

Micruity hosted the recent Chicago-area Ambassador Event at Susanna Farms in Lake Villa, IL. This was a great opportunity to connect with industry peers and enjoy some fun with the family in a relaxing farm setting

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## Industry Updates & Thought Leadership

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### Allianz

Study from Allianz Center for the Future of Retirement uncovers attitudes, preferences, and growing demand for annuities in employer-sponsored plans.

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### TIAA Institute

Findings from the Nuveen and TIAA Institute Participant Sentiment Survey on Lifetime Income

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### T. Rowe Price

A five-dimensional framework to help DC plan sponsors evaluate retirement income solutions for their participants

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### Vanguard

How America Saves 2025: A look at the current state of DC retirement plans and the data that sponsors and consultants need to help their participants take the right actions for a more prosperous retirement .

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## Micruity on the Road - Where to Find Us

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*While the summer is typically a slower time of year for industry events, we are looking forward to things picking back up again over the next few months. Here are some of the places you can find us as we continue advancing the dialogue around retirement income.*

### SPARK Institute Q3 Advisory Board Meeting

September 9 - 10th, Washington, D.C. | [Register →](#)

### RRC Summit and DCIIA Academic Forum

October 14 - 15th Minneapolis, MN | [Register →](#)

## LET'S CONNECT

Ready to transform how Americans retire? Whether you're exploring new solutions or enhancing existing offerings, is here to partner with you. Contact me at [trevor.gary@micruity.com](#) to discuss how our scalable platform can help you deliver the retirement income solutions of tomorrow.



## Discussion with Carrie Meyer - The importance of a strong stewardship review process.

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Carrie Meyer, Micruity's new senior client success manager, brings deep expertise in retirement income implementation, and governance. In this quarter's newsletter, Carrie shares her insights on the importance of a strong stewardship review process:

### CARRIE MEYER



**When implementing retirement income solutions, what is the main objective of the stewardship meeting? What are some of the key elements of the stewardship meeting?**

The objective is to provide a platform to disseminate business updates and organizational priorities, highlight evolving product initiatives and enhancements, and review key metrics, all from a strategic lens.

**Some of these products/solutions have multiple stakeholders at different organizations. How are the various groups involved/participating?**

We regularly work with folks across various organizational functions; however, for the stewardship meeting, our audience consists of key decision-makers who are involved in setting or influencing their organization's strategic retirement income-focused priorities.

**What are some of the benefits of nurturing a stewardship process? How often should it take place, and how far into projects do you introduce the stewardship process?**

The stewardship process begins during implementation to align with strategic priorities. It typically takes place at least annually; however, depending on partnership activity, a more frequent rhythm, such as quarterly or semi-annual meetings, might be more suitable.

**How do you structure the feedback and input, and how can this be fed into the future product development and roadmap process?**

The outcomes of these discussions directly influence our product development, roadmap, and capacity planning, though balancing our partner's needs with our product initiatives is a balancing act; these conversations help facilitate a more precise alignment of priorities.

**Share with us about your professional background and how leveraging a strong stewardship process has provided value in the past?**

Relationship management has always been a core aspect of my career. I strongly believe that clients are central to any business, and understanding their explicit and implicit needs and collaborating to address them is fundamental for success.

**Any other takeaways, etc?**

I can't wait to meet with our partners!

If you want to read more about the stewardship process, [check out this entry](#) as part of our **News and Updates** section.

To learn more about the Micruity team, you can check out further info on [The Micruitian Corner Blog](#)

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