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From the Editor

It's been a dynamic and exciting time for Micruity in 2025. We are proud to be actively supporting a growing number of clients in implementing new income solutions, empowering plans and their participants to secure their futures with a reliable "paycheck" in retirement.

This period of expansion is supported by an exciting internal shift: the completion of our Series A funding (detailed later in this newsletter). This funding provides the resources needed to scale and support our increasing client base. As such, operational infrastructure capable of achieving this scale is critical, and in this newsletter, you will hear directly from our Head of Operations, Leanne Arsenault.

Our team remains deeply engaged in the defined contribution and retirement income market, demonstrated by our active participation at multiple industry events and our work with key industry organizations.

We hope you enjoy this quarter's newsletter.

Matthew Streeter, CFA
Senior Partnerships Lead

Industry Updates & Thought Leadership

Micruity Series A

Micruity closes Series A funding round, helping accelerate integrations across recordkeepers, asset managers, and insurers and scale the infrastructure that will ultimately power retirement paychecks for millions of Americans

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Vanguard - TIAA

Vanguard announced their collaboration with TIAA to deliver a retirement income solution designed to provide retirees with access to a guaranteed income stream for life

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Annuity Hub

Launch of 401(k) Annuity Hub, a complete universe of actively marketed 401(k) solutions and other key analytics

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Bank of America

Bank of America Launches 401k Pay, a comprehensive solution that simplifies Retirement Income Management

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Fidelity Investments

5 moves, 5 years before retirement

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CapTrust

CapTrust's 2026 Retirement Plan Industry Predictions

[Read More →](#)

Micruity News

Micruity closes Series A funding round

All of us at Micruity are excited to announce that our company has received \$20 million in Series A funding, with the funding round co-led by Rebalance Capital and Nationwide Ventures, with participation from J.P. Morgan Asset Management, Reinsurance Group of America (RGA), The Guardian Life Insurance Company of America (Guardian), Collab Capital, State Street Investment Management and TIAA Ventures, in addition to SixThirty Ventures, Pacific Life Insurance Company, Prudential, and Western & Southern Financial.

This funding allows Micruity to accelerate integrations across recordkeepers, asset managers, and insurers, expand support for new lifetime income solutions and scale infrastructure.

[Read More →](#)

Micruity at the 2025 SPARK Forum

Micruity's Elizabeth Heffernan participated in a lively panel at the SPARK Forum on TPAs, *exploring how third-party administrators are partnering with advisors, recordkeepers and plan sponsors to drive strategic initiatives and stand out in a rapidly evolving marketplace, across a range of topics.*



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 mstreeter@micruity.com to discuss how our scalable platform can help you deliver the retirement income solutions of tomorrow.



Micruitian Corner: Leanne Arsenault, Head of Operations



This quarter, we sat down with Micruity's Head of Operations, Leanne Arsenault. Leanne has an impressive technology background and has been with Micruity since our very early days. With many moving parts in a fast-growing technology organization, operations play a critical role in the organization's success, and we wanted to share Leanne's perspective for this installment.

How did you get your start in technology / financial services? Were you always interested in this path?

I wouldn't say I started out knowing I would end up at the intersection of tech and financial services, but I was always drawn to solving complex, systemic problems. I've always loved the rigour and innovation found in startups, and I've always been interested in SaaS and its ability to change the world.

Can you tell us about your professional background?

My fintech career started in a small startup solving for roof repair vs replace equations, using a digital pen and digitized paper. After a few years building up knowledge and capital at Indeed, I went on to found my own startup in the roof assessment automation space. Through years of learning, I brought my experience to CoreLogic, where I continued to build upon my knowledge of enterprise B2B SaaS in the fintech arena. After going back to school for an MS in Software Engineering and continuing to pursue a career in B2B fintech SaaS, I joined Micruity to build out the SOC 2 compliance program. Throughout my career, I have worked on optimizing cross-functional workflows, managing risk, and building out the infrastructure required to support rapid growth.

What made you initially want to join Micruity?

I was excited by the opportunity to join a truly revolutionary startup with an impactful mission. The retirement industry has spent decades perfecting how to help people accumulate wealth, but almost completely ignored how to help them safely draw it down. The concept of building the infrastructure that

makes lifetime income products accessible within standard retirement plans was a lightbulb moment for me.

How has Micruity changed since you first joined?

Since I joined, we've matured from a company proving out a revolutionary concept to an organization executing at an enterprise level. We've scaled our processes, hardened our infrastructure, and moved from early-stage agility to robust, secure scalability. The conversations we have with partners now aren't just about if this technology works, but how fast we can integrate it.

What is most interesting about the role?

On a day-to-day basis, I often go from strategic planning, to security conversations with customers, to contract review and negotiation, to vendor assessment, to payroll filing report adjustments, to cash management activities and conversations with auditors. There is never a dull moment, and there are constant opportunities to improve company processes into scalable and compliant operational plumbing.

What do you see in the future for Retirement Income?

I see a future where guaranteed retirement income (pension-like features) are standard, seamless inclusions within 401Ks. The retirement ecosystem is incredibly complex, but Micruity enables a future where recordkeepers, asset managers, and plan sponsors can easily connect with one another as well as the financial services industry at large.

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Micruitian Corner: Leanne Arsenault, Head of Operations

What excites you about the opportunity for Micruity and how you leverage your skillset to build a successful organization?

Micruity excites me because it isn't just another product; it's the central nervous system connecting a historically fragmented industry. My ability to wear multiple hats and strategize from various vantage points helps me drive internal improvements every day.

How do you impart this vision to your team and ensure they always keep a line of sight on the end-customer objectives?

The Operations team works every day to connect metrics to impact, engage in transparent communication, and foster empathy. In Operations, it is easy to get caught up in the internal mechanics of the business: optimizing workflows, managing vendors, resolving internal tickets, and ensuring our cross-functional teams have the tools they need. Because our day-to-day focus is primarily internal, it can sometimes look like we are removed from the front lines of client acquisition. But the reality is exactly the opposite. Everything we build internally is designed to support Micruity's most critical external objective: winning key clients and keeping them incredibly happy.

If you want to learn more about how the implementation team is the core of client initiatives,, [check out this entry](#) as part of our news & blog section.

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

Micruity on the Road: Where to Find Us

There's a lot going on for our Micruity team, and we are looking forward to being out in the market and connecting with clients and industry peers. Here are some of the places where we've been and where you can find us in the near future, as we continue advancing the dialogue around retirement income.

EBRI - Milken Institute Retirement Symposium

March 19, Washington, DC | [Read more →](#)
Elizabeth Heffernan will be a panelist for a discussion on: *Innovations and FinTech Developments that Help Savers Help Themselves*

DCIIA Innovation Forum

March 26th, Newport Beach, CA | [Read more →](#)

DCIIA Retirement Research Center (RRC) Spring Summit

March 27th, Newport Beach, CA | [Read more →](#)

NAPA 401(k) Advisor Summit

April 19 - 21st Tampa, FL | [Read more →](#)

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