

# WTW's MPF Advisory Services

## 1

### What might MPF clients be asking?

- How is the performance of my MPF provider?
- How do I set up an MPF scheme for a new entity?
- How do I review my MPF scheme? What factors should I assess?
- What are the legal obligations as an employer?
- Are my members getting the best deal on MPF fees?
- Are our retirement benefits competitive? What are others offering?



## 2

### How can WTW help?

- Advise and support on all aspects of MPF including:
  - New scheme set-up
  - Review an existing scheme / benefit design
  - Ongoing governance and management
  - Conduct a provider search and implement the change
- Quarterly updates on MPF fund returns vs. other providers
- Update on key market / product changes and actions needed
- Negotiate fee rebates
- Enhance member awareness and education of MPF



## 3

### Why do clients choose WTW?

- Independent, unconflicted advice – WTW is not tied to any provider, WTW represented the client to source for the best solution
- We know the MPF (and ORSO) market inside out, having served clients of all sizes for many years
- We get direct priority service from all major MPF providers
- We act as extra HR support on MPF matters



## 4

### What's unique about WTW MPF Advisory team?

- The largest consulting team specializes on retirement advisory services
- 10+ licensed MPF intermediaries, and most are also actuaries
- Senior consultants with average 20+ years of retirement experience within WTW
- Serving 400+ clients, advising on a large majority of HK retirement consulting and actuarial projects
- Comprehensive benefit design database with 400+ major employers in HK
- We offer both fee and commission model to better fit employers' budget need



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