

Looking Forward: Fidelity's 16th Annual Plan Sponsor Attitudes Survey Results

The **16th annual Plan Sponsor Attitudes Survey** of more than 1,100 plan sponsors sheds light on how organizations are *simplifying the complex*—navigating an evolving retirement landscape while striving to deliver meaningful outcomes for participants in an increasingly dynamic benefits environment.

From streamlining plan design and investment options to expanding adoption of fiduciary services like 3(16) and 3(38), sponsors are finding new ways to strengthen their plans and better serve participants. The results highlight emerging trends, shifting priorities, and practical opportunities that are helping advisors stay ahead and build stronger, more strategic relationships with their clients. Watch to learn about:

- The latest trends in plan design, investment menus, and fiduciary service adoption
- What plan sponsors value most in their advisor relationships—and what prompts them to explore new partnerships
- How sponsors' top goals and concerns are shaping the future of retirement plan strategies

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