

ING Extends its Fiduciary Service Program to More Types of Retirement Plan Sponsors



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Portfolio Blueprint® program with Morningstar Associates, LLC now available to healthcare, education and not-for-profit employers

ING's U.S. Retirement Services business, a leading provider of workplace retirement products and services, announced today that the company will be expanding its industry-leading program for researching, selecting and monitoring plan investments to support more types of employers.

The program, Portfolio Blueprint® powered by Morningstar Associates, is currently offered to ING's ERISA 401(a) and 401(k) corporate plan sponsor customers. Now, ING will also make Portfolio Blueprint available to healthcare, education and not-for-profit employers sponsoring qualified 401(a), 401(k) and 403(b) retirement plans.


"Today's retirement plan sponsors, including those in non-corporate sectors, face greater regulation, tighter budgets and reduced resources. Many also lack the in-house expertise needed for proper plan administration," noted Brian Comer, president of Public Markets for ING U.S. Retirement Services. "Meanwhile, these same employers must operate their plan in the interest of participants and their beneficiaries, with a fiduciary responsibility for selecting and monitoring the appropriate investment options. ING's Portfolio Blueprint program addresses this substantial challenge and can now provide sponsors across various markets with cost-effective investment expertise and fiduciary support, regardless of whether they work with a financial professional."

Through Portfolio Blueprint, ING plan sponsor clients can elect to receive:

- ▶ Professional and objective fund analysis from an independent third party.
- ▶ A fully diversified menu of investment options designed to meet the needs and profile of the sponsor's workforce.
- ▶ A professionally drafted Investment Policy Statement (IPS).
- ▶ Quarterly monitoring reports and memos outlining fund changes.
- ▶ Acknowledgement of fiduciary responsibility by Morningstar Associates for their investment advisory services under section 3(21)(A)(ii) of ERISA.

"As one of the largest providers of workplace retirement plans, we've seen considerable interest in and use of Portfolio Blueprint by our customers and the financial professionals who support them. During the past two years, assets under the program have nearly doubled," said Rick Mason, president of Corporate Markets for ING U.S. Retirement Services. "ING is pleased to provide this best-in-class fiduciary assistance so even more employers can meet their plan obligations and best serve their employees."

ING offers a wide selection of proprietary and non-proprietary funds under the program. Plan sponsors select from a list of eligible investments recommended by Morningstar Associates. Portfolio Blueprint then allows sponsors and their financial professionals the flexibility to choose which investment options best suit the needs of their workforce.

For more information on ING's Portfolio Blueprint program, including specific pricing terms and availability for healthcare, education and not-for-profit employers, please contact ING's Sales Desk at  **1-866-481-3653** , option 4.

ING's U.S. Retirement Services business holds top rankings in the defined contribution industry with more than \$277 billion in combined assets under management and administration. Leveraging over 40 years of retirement plan experience, ING is one of the few providers that serves all types and sizes of customers, including corporate, government, healthcare, K-12 and higher education employers.

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About Portfolio Blueprint®

Through a strategic relationship with Morningstar Associates, LLC, a registered investment advisor and wholly owned subsidiary of Morningstar, Inc., ING makes available Portfolio Blueprint®, a service offering investment solutions and fiduciary support from Morningstar Associates for plan sponsors. Morningstar Associates makes its fund selections from the fund platform that is available under the applicable ING product, which is a subset of the broad fund universe, and which consists of ING proprietary funds and unaffiliated funds that may have agreed to pay ING compensation in connection with sales of those funds and/or payments for services provided by ING or its affiliates on behalf of the funds. ING may at times request that Morningstar Associates reconsider specific fund selections but the final decision on which funds are selected for Portfolio Blueprint is Morningstar Associates'. Morningstar Associates has no ability to choose the funds that are made available under ING's products and contracts. The Morningstar name and logo are registered marks of Morningstar, Inc. All other logos and marks are the property of their respective owners.

About ING

ING is a global financial institution of Dutch origin offering banking, investments, life insurance and retirement services to over 85 million private, corporate and institutional clients in over 40 countries. With a diverse workforce of more than 107,000 people, ING is dedicated to setting the standard in helping our clients manage their financial future.

In the U.S., the ING (NYSE: ING) family of companies offers a comprehensive array of financial services to retail and institutional clients, which includes life insurance, retirement plans, mutual funds, managed accounts, alternative investments, direct banking, institutional investment management, annuities, employee benefits and financial planning. ING holds top-tier rankings in key U.S. markets and serves approximately 30 million customers across the nation. For more information, visit www.ing.com/US.

ING and its companies are not affiliated with the Morningstar family of companies and receive no fee or other direct financial benefits from Morningstar in connection with the use of its services.

About Morningstar Associates, LLC

Morningstar Associates, LLC, a registered investment advisor and wholly owned subsidiary of Morningstar, Inc., is a premier provider of independent investment consulting services and retirement solutions. The firm resides within Morningstar's Investment Management division, which advises on more than \$100 billion in assets and works with 23 plan providers representing more than 150,000 plan sponsors (of all sizes and backgrounds from micro to jumbo plans) and 20 million participants (as of September 30, 2010).

Neither Morningstar Associates nor Morningstar, Inc. is affiliated with ING and its affiliates. Morningstar Associates does not act in a capacity of an advisor to individual investors.