



T.RowePrice

Consistent service. Consistently excellent. Year after year.

That is the T. Rowe Price difference.

Why do our plan sponsor clients stay with us for the long term? Because of exceptional service.

Delivering better outcomes for retirement plans and participants starts with T. Rowe Price's high-touch service. The numbers prove it.

A proven track record

We measure our performance each year by participating in Chatham Partners' annual client satisfaction survey. It's a critical opportunity to gather insights and feedback from our plan sponsor clients through an independent, unbiased third party and compare our performance against the Chatham benchmark, which includes six major retirement industry providers.



13 years

(and counting)

Our clients have awarded T. Rowe Price with Net Promoter Scores¹ that have exceeded Chatham's benchmark of large retirement plan recordkeepers for 13 consecutive years.

In 2023, our clients' responses put us at the top of the pack in three key measures:

#1

overall
satisfaction
7 years
in a row

#1

Net Promoter
Score[®]
9 years
in a row

#1

loyalty
4 years
in a row

Our clients stay with us because we stand with them.



14 average
Years client
tenure²



97% client
retention
rate³

"Our client service team has helped us make some truly impactful and helpful changes to our plan."

-Plan sponsor client, \$56M in plan assets

What do our plan sponsor clients think of us?

T. Rowe Price is the top performer in 9 of 10 measures of overall impressions.

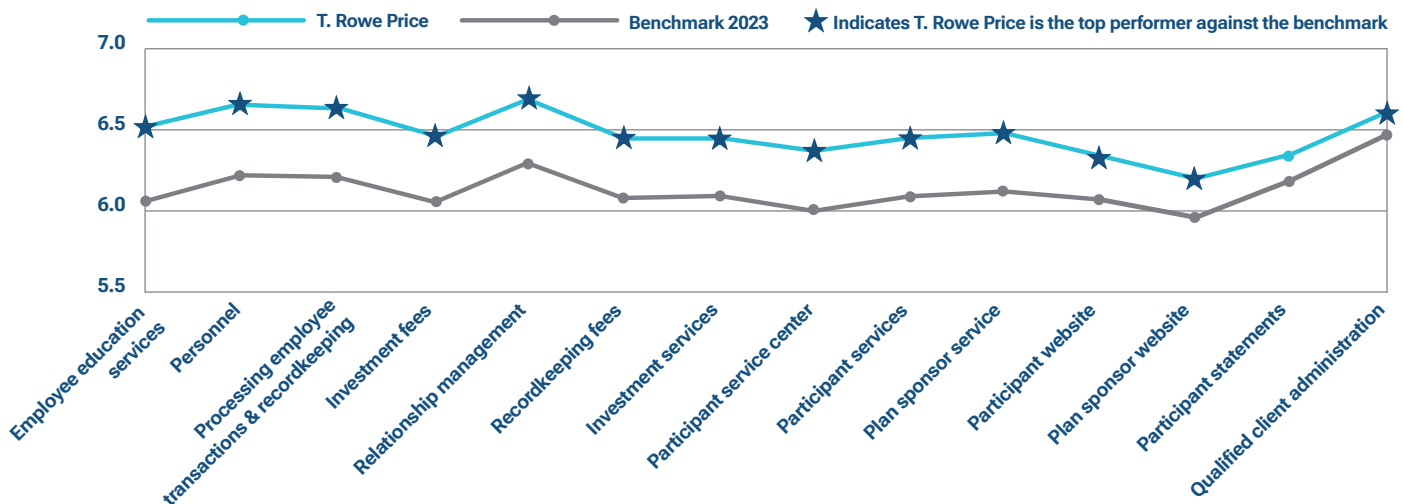


“T. Rowe Price is head and shoulders above your competitors, most of whom can’t handle our complexity. They want everything cookie cutter and lack the flexibility T. Rowe Price has.”

—Plan sponsor client, \$383M in plan assets

Are plan sponsor clients satisfied with our products and services?

T. Rowe Price is the top performer in 13 of 14 measures of products and services.



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² Clients with plans on our OMNI recordkeeping platform as of September 30, 2023.

³ Client retention rate in 2023 and average over three years, from 2021-2023.

About the survey

In June through August 2023, T. Rowe Price engaged Chatham Partners, an independent third-party research consultant, to assess current client satisfaction levels with the goal of providing actionable insights to enhance the overall client experience. Questions were rated on a 7-point scale in which “7” represents “very satisfied,” and “1” represents “very dissatisfied.” Results were evaluated using “very satisfied” (top 2 box) combined scores of “6” and “7” (representing the highest levels of satisfaction and loyalty). T. Rowe Price outscores Chatham’s proprietary industry benchmark for 54 of the 57 areas measured against the benchmark, including several personnel and fee attributes strongly correlated to overall satisfaction. There is a low sample of competitor providers in the benchmark for qualified client administration, investment fees, and recordkeeping fees.

T. Rowe Price Retirement Plan Services, Inc.