



Memorandum

To: The SPARK Institute Membership

From: Larry H. Goldbrum

Date: December 2, 2010

Re: **Lifetime Income Solutions Data Layouts Utilization Survey Results**

We surveyed member companies between October 27th and November 15th regarding their intent to utilize The SPARK Institute Lifetime Income Data Standards and their anticipated readiness dates. We received responses from 15 record keepers. Overall, more than 85% indicated they are planning to use one or more of the service models.¹

1. Which service model(s) under The SPARK Institute Lifetime Income Data Standards will your record keeping system support?

47% -- Record Keeper Traded Model (Part 2)
27% -- Provider Traded Model (Part 3)
20% -- Guarantee Administrator Model (Part 4)
20% -- Undecided about which model
13% -- Do not intend to support any

2. When will your record keeping system be ready to support any of the service models? (13 applicable respondents, i.e., excludes the two companies that do not intend to support any of the models).

15% -- Ready now
15% -- Within 3 months
8% -- 3-6 months
15% -- 6-9 months
0% -- 9-12 months
46% -- More than 12 months

Please contact me if you have any questions about this information.

¹ Results do not add to 100% due to rounding and the planned use of more than one service model by some record keepers.