

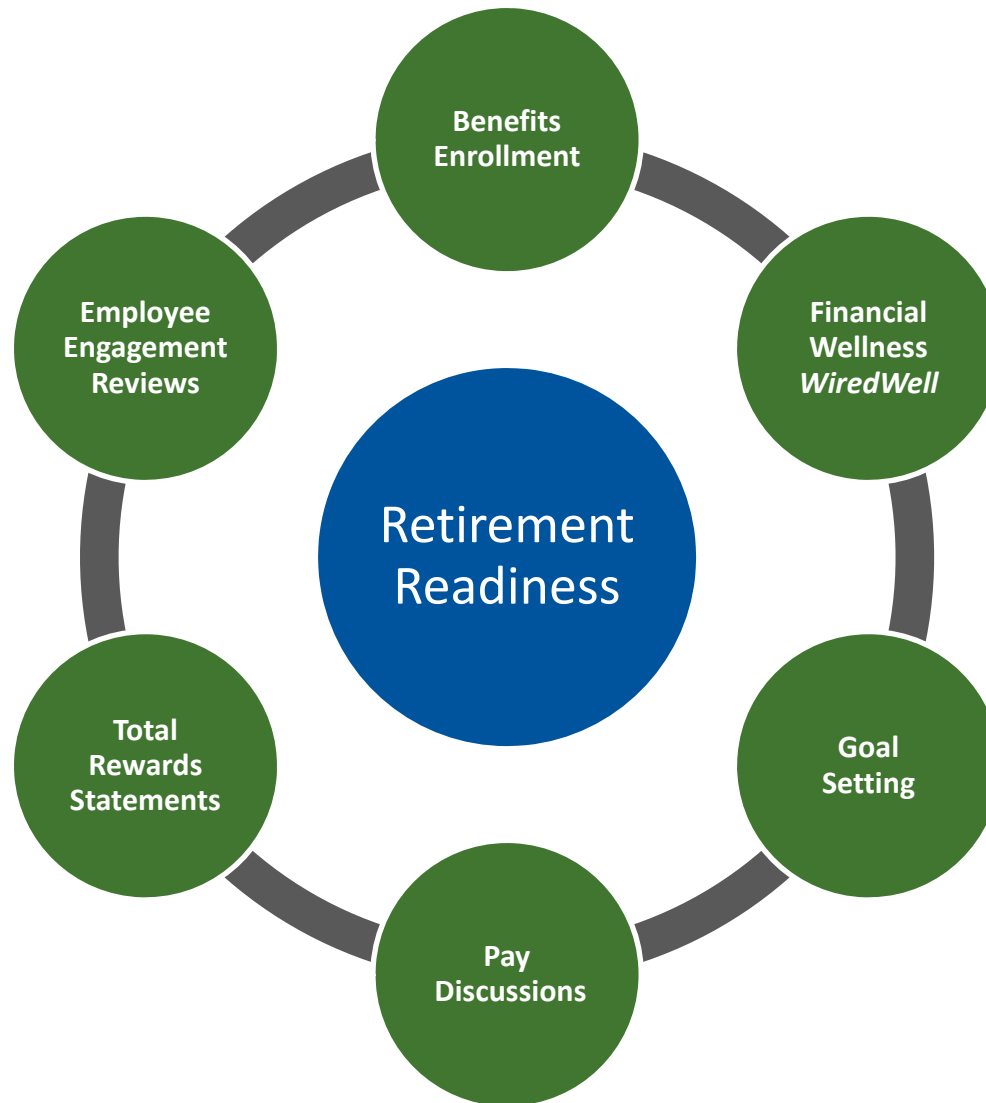
Retirement Readiness: Plan Sponsor Success Factors

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Beyond the Basics

- Provide tools that help employees stay financial fit
- Help employees see the whole picture
- Leverage opportunities to promote retirement messages
- Engage leaders and create a shared ownership in promoting employee engagement and participation

Leveraging Opportunities



Getting Started

- Plan Sponsor:
 - Think beyond traditional retirement education
 - Identify annual HR initiatives that align with retirement readiness activities
 - Partner with your plan provider for additional support
 - Engage your leadership team
- Consultants/Plan Providers:
 - Know your client: Understand their employees, challenges and annual retirement discussion opportunities
 - Revisit your resources and recommend relevant educational tools for your clients